

TRAVEL EXPENSE/REIMBURSEMENT POLICY AND PROCEDURES

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Approved by: ACPEF Executive Committee

Effective Date: July 15, 2019

Policy (New or Revised): Revised

Revised Date: January 3, 2019, February 23, 2019

I. Purpose

The American College of Prosthodontists Education Foundation (ACPEF) Board members understand that stewardship of ACPEF resources is essential. This policy is to reimburse expenses in conjunction with ACPEF related business, to ensure compliance with Internal Revenue Service (IRS) regulations and ACPEF annual budgets.

II. Scope of Policy

In general, the ACPEF will reimburse necessary, actual and reasonable expenses for individuals traveling on College/Foundation business. The ACPEF does not reimburse Annual Meeting expenses. All Board members are expected to minimize the costs of travel as much as possible or reasonable.

III. Travel Expenses

- A. Airfare: The ACPEF will reimburse round trip coach airfare for the February ACPEF Board meeting booked a minimum of 30 days prior to the date of departure up to \$600 without prior approval. It is the responsibility of the board member to make airline reservations. The ACPEF does not have preferred travel agent or airline. When a board member decides to select a higher class airline ticket they should submit the cost of a coach ticket at the time of booking for reimbursement after the meeting. Board members will receive an expense reimbursement form immediately following each meeting and must submit their expense report with receipts within 30 days post meeting to the ACPEF for reimbursement.
- B. Mileage: The ACPEF will cover mileage at the current IRS' current year's standard mileage rate for those driving to a meeting instead of flying.
- C. Ground Transportation and Parking: The ACPEF covers ground transportation (recommend using ridesharing services) and parking costs for the February in Chicago up to \$75 per trip with receipts. The ACPEF does not cover the cost of car rental, limousine or special charter services not arranged by the ACP staff.

IV. Lodging Expenses

- A. Hotel: The ACPEF covers the cost of hotel (room and tax only) for the February board meeting. The total room nights covered for each meeting may vary depending on specific meeting needs. The ACP staff will inform Board members of what is covered in advance of each meeting and will book room reservations for the February meeting with room and tax being directly billed to the ACPEF. Staff can reserve any additional nights needed at the board members own expense provided the request is made at least 30 days prior to arrival and the hotel has availability.

V. Meal Expenses

- A. Meals: Meal costs outside of those provided during the meeting will not be reimbursed.

VI. Annual Meeting

- A. Board members are responsible for all travel and other expenses for the fall board meeting held in conjunction with the ACP Annual Session. This includes paying ACP Annual Session meeting and other ticketed event registration fees with the exception of the current ACPEF Chair and ACPEF Vice Chair. They receive complimentary meeting registration, 2 complimentary welcome reception tickets a complimentary awards dinner ticket and complimentary hotel rooms for up to 6 nights. All other tickets for family members at social events will be the responsibility of the board member and billed accordingly.

For your convenience the ACP staff will make room reservations with all charges billed to the board member.

VII. Other Types of Expenses

- A. Spouse/Relative/Guest Travel: A Board Member traveling on ACPEF business is responsible for any expense incurred by an accompanying spouse, relative or friend including, but not limited to, airfare, additional room charges, activities and meals.
- B. Incidental Reimbursable Expenses: Ground transportation to/from the individual's home and the airport and to/from the airport and the meeting location; tips for sky caps, bellmen, etc.; luggage fees; parking when a personal or rental auto is used and reimbursed; other incidental expenses subject to adequate documentation.
- C. Incidental Expenses Not Reimbursed: Hotel and airline movies; travel insurance; dry cleaning/laundry, greens fees, tennis court fees, ski lift tickets, health clubs, spa fees, etc.; reading material not directly related to Foundation business.
- D. Board Travel Reimbursement for non ACPEF meetings: Board members may be asked to travel to other dental meetings that are not organized by the ACPEF. The Chair will contact you regarding attending these meetings and they will be noted on the Board Calendar.

1. Hotel: If you need assistance with hotel accommodations, contact the Meetings Department and provide the following:
 - a. Meeting name/location
 - b. Hotel preference
 - c. Hotel rewards # if applicable
 - d. Arrival/Departure dates
2. Airfare: The ACPEF will reimburse round trip coach airfare booked a minimum of 30 days prior to the date of departure up to \$600 without prior approval. Anything over \$600 will need approval. It is the board members responsibility to make airline reservations. The ACPEF does not have a preferred travel agent or airline. Should a higher-class airline ticket be purchased, please note, the ACPEF will only reimburse you for the cost of a coach ticket at the time of booking.
3. Ground Transportation: The ACPEF covers ground transportation (recommend using rideshare services) and parking costs up to \$75 per trip with receipts. The ACPEF does not cover the cost of car rental, limousine, or special charter services not arranged by the Central Office.
4. Meals: Meal costs outside of those provided during the meeting will be reimbursed up to \$70 per day with receipts.
5. Meeting Registration: The meeting registration fees will be reimbursed after the meeting with receipts. Since associations often require membership numbers, log in details, optional events and personal preferences that are required during the registration process, it is best for the attendee to complete the registration. If board members prefer that ACP staff provide assistance with this please contact the Meetings Department.

VIII. Reimbursement Procedures

- A. To be reimbursed for expenses incurred, a signed Travel Expense Reimbursement form should be submitted as soon as possible after the completion of the business travel, but not later than 30 days after the travel has been completed.

Whenever possible, expenses should be documented by receipts. All expenses over \$25 must be documented by an original receipt (**credit card statements are not accepted by the IRS as documentation**). Receipts for expenses paid by credit card should show that the credit card was charged.

- B. In the event that both ACPEF business and personal travel is included, only those expenses which are ordinary and necessary in the execution of individuals' duties are reimbursable.
- C. Completed expense forms with corresponding receipts must be sent to the Finance & Administration Director. Once reviewed and accepted they will be forwarded to the Executive Director for approval.

- D. Expenses older than 90 days will not be reimbursed unless approved by the Executive Director.
- E. Questions concerning expenses not covered by this policy should be directed to the Finance & Administration Director.

IX. References

- [AAO Physician Travel Expense/Reimbursement Policy and Form](#)
- [Association Forum Resource: Expense Reimbursement Policy](#)

X. Related Policies

- ACP Board of Directors Meetings Travel Reimbursement Guidelines.
- ACP/ACPEF Officer Travel Reimbursement Guidelines for non-ACP meetings

XI. Review/Revision Dates

XII. Approval Groups

ACPEF Executive Committee, ACPEF Board of Directors