

**NATIONAL ASSOCIATION OF HEALTH UNDERWRITERS
POLICY & PROCEDURES**

POLICY TITLE:	NAHU Travel and Entertainment Policy
CLASSIFICATION:	Finance
POLICY NUMBER:	98-01-F
DEPARTMENT COORDINATOR:	Finance
MOTION:	Bob Tretter
DATE APPROVED:	June 6, 1998
AMENDED:	June 20, 2012, February 17, 2015
APPROVED BY:	Board of Trustees
SUNSET DATE:	2018

PURPOSE: To define the policies for travel and entertainment by members of the NAHU Board of Trustees, its committees, task forces, advisory groups and subsidiaries and others traveling at NAHU expense for meetings where attendance has been requested or required. Each member is reminded that NAHU's image can be best served by the use of restraint rather than extravagance in spending the Association's (and therefore the members') money.

POLICY:

1. All expense requests must be submitted using the standard NAHU expense reimbursement request form, which must include dates and business purpose of all travel and/or entertainment.
2. Receipts are required for all expenses. Receipts should detail the NAHU business purpose of the expense and list the individuals involved.
3. When traveling on NAHU business, the following expenses are eligible for reimbursement:
 - A. Single hotel room rate and tax. This will be billed to the NAHU master account when attending an NAHU function – Convention, Capital Conference, budget or board meeting. Additional room charges (upgrades, computer/fax equipment charges, movies, etc.) and incidentals will be the responsibility of the member.
 - B. Transportation.
 - Airline transportation – coach fare only. NAHU encourages travelers to use NAHU's official travel agency. Airline tickets may be charged directly to NAHU's account unless specifically authorized by NAHU's Chief Financial Officer. Airport parking will be reimbursed at the lowest parking rate. Receipts must be provided.
 - Airfare upgrade – Reimbursed if national meeting is adjourned more than 3 hours early.
 - By car – Will be reimbursed at 50% of the IRS standard, plus applicable toll charges; please provide all toll receipts. Reasonable parking fees may be submitted in addition to travel expense. Total mileage reimbursement will be limited to reasonable coach airfare between destinations.
 - By cab – for inner-city destinations only. Not to be used for travel between cities. Receipts required for all cab fares.
 - C. Meals – Breakfast, lunch and dinner. NAHU will reimburse a per diem (maximum) of \$75 per day (\$10 per breakfast; \$15 per lunch; \$50 per dinner) for all meals incurred by an individual traveling on NAHU business. Additionally this limit will

- apply per person if more than one person's meal expenses is included in the reimbursement request. When submitting meal expenses for yourself and others, you must identify the participants and the reason for the expense. You will not be reimbursed for meal expenses for family members. Meal reimbursement is only for those conducting valid NAHU business and shall not be used to recognize and/or reward members or others.
- D. Expenditures on Members. NAHU funds are not to be used to host non-budgeted meal functions or other events, or to purchase non-budgeted gifts, whose purpose is recognition or appreciation for NAHU members, volunteers or representatives.
 - E. Baggage. The association will reimburse the expense for excess baggage only if the excess is Association business material essential to the trip.
4. When submitting non-travel related expenses, all receipts must be included, with an explanation of the purpose of the expense. NAHU officers or committee members invited to NAHU chapter-sponsored events (sales symposia, regional meetings, legislative conferences, etc.) to serve in an official capacity should not be charged registration fees by the sponsoring chapter. The NAHU officer or committee member should clarify this with the chapter prior to the event.
 5. NAHU travelers attending in a non-official and non-budgeted capacity will not be reimbursed for their expenses.

Expense Submission Review: All expense reimbursement requests must be received by NAHU headquarters within 60 days from the date incurred. Requests received after 60 days will require approval by the Finance Committee

FINANCIAL IMPACT: None