ARIZONA ASSOCIATION OF HEALTH UNDERWRITERS
POLICY & PROCEDURES

POLICY TITLE:	AAHU Travel and Expense Reimbursement Policy
MOTION:	Jennifer Farrell
SECONDED:	Denisse Bravo
DATE SUBMITTED (INITIAL):	2/6/2020
DATE APPROVED:	2/6/2020
APPROVED BY:	AAHU 2019-2020 Board
SUNSET DATE:	2/6/2025

PURPOSE: To set forth guidelines for travel expense reimbursement for Officers, Board Members and Committee Chairs. The Association will do its best reimburse delegates who attend and participate in NAHU's Annual Convention, the regional conference and Capitol Conference. Reimbursement funding is determined on a yearly basis the Association's Board of Directors. Each member is reminded that AAHU's image can be best served by the use of restraint rather than extravagance in spending the Association's (and therefore the members') money. Reimbursement is for actual incurred costs by member.

POLICY:

1. All expenses you would like to be reimbursed for must be submitted using the standard AAHU expense reimbursement request form, which must include dates and business purpose of all travel and/or entertainment. Form should be submitted no later than 45 calendar days after event has taken place.
2. Receipts are required for all expenses.
3. When traveling on AAHU business, the following expenses are eligible for reimbursement:

- **Hotel**: Hotel reimbursement is based on half of the double occupancy rate at the hotel chosen by the event sponsor. It is the member's responsibility to find a roommate to share in this cost. Otherwise, the member is responsible for the balance of the hotel room. Exceptions may be made based on board approval. Members may stay at different hotels when circumstances warrant, the reimbursement will not exceed half of the double occupancy rate of NAHU endorsed hotel.

- **Registration**: AAHU will reimburse the cost of early bird registration. If no early bird registration is available, full registration will be reimbursed.
- **Transportation.**
  - Airline transportation – coach fare only. No upgrades will be paid.
  - **By car** – Will be reimbursed at IRS standard, plus applicable

toll charges; please provide all toll receipts. Total mileage reimbursement will be limited to reasonable coach airfare between destinations.

- **Meals –**Meals are generally not reimbursed unless exception is made based on money available in the budget and noted in chapter minutes.
- **Expenditures on Members**. AAHU funds are **not** to be used to host **non-budgeted meal functions or other events**, or to purchase nonbudgeted gifts, whose purpose is recognition or appreciation for NAHU members, volunteers or representatives. AAHU shall not reimburse the purchase of alcoholic beverages either as part of a meal or as a stand alone item (i.e. a "bar tab").
- **Baggage.** The association does not reimburse the expense for baggage.
- **Rental Cars.** Rental cars or rides to/from airport to conference facility are generally not reimbursable. However, at the discretion of the board based on current budget and circumstance/location of the conference, select reimbursement may be considered.
- **Exceptions.** Any exceptions should be discussed prior to booking travel arrangements.

4. **Items not allowed.**
   There is no reimbursement for the following: room service, alcohol, items purchased in hotel room mini-bars, movies, massages, gyms, and other extraneous luxuries. Additionally, a member will not be reimbursed for any airline or hotel expenses if the member fails to attend the event and complete his or her stated obligation(s) for any reason.

5. **No double reimbursements**
   When attending an event as this chapter's representative as well as another chapter/organization's representative, this chapter may reduce the amount of available reimbursement funds to prevent double reimbursement for the same expenses. In no case will a member be reimbursed twice for the same expenditure.

6. **Mandatory attendance.**
   Reimbursement is contingent on a member's participation in specific events, functions or activities. If a member fails to attend any of the specified functions, events or activities or complete his or her obligation, his or her eligibility for reimburse is nullified. In such a case the member will have 45 calendar days to reimburse the chapter for their expenses.

7. **Timing**
   Please submit your reimbursement requests as soon as possible, preferably within 45 days after the expense, so your reimbursement can be processed promptly. Check will be issued by the Treasurer. Reimbursement may take up to 3 weeks to arrive after submission.