

## Travel Reimbursement Request

Reimbursement will be in accordance with CALS policy (printed on reverse side). Please submit this form, with all receipts attached, within 30 days of completion of travel. Expenses over \$25 will not be reimbursed without a receipt, except for mileage reimbursement. All expenses should be itemized on this form regardless of their amount.

Name	Destination/Location	
Address	Business Purpose & my role	
City/State/Zip	Dates of travel	Phone # where I can be reached

**Travel** (Current IRS mileage rate or coach airfare whichever is lower):

	Amount	Donate to CALS*
Reimburse ____ miles traveled at current IRS rate of \$0.545 cents per mile	\$	Miles**
Parking	\$	\$
Coach Airfare (approved in advance)	\$	\$
Ground Transportation To/From airport	\$	\$

**Meals** (not to exceed \$35 per day for all 3 meals, receipt MUST BE ITEMIZED to receive reimbursement):

Date	Breakfast	Lunch	Dinner	Subtotal	Donate to CALS*
				\$	\$
				\$	\$
				\$	\$

**Lodging & Other**

	Amount	Donate to CALS*
Lodging (dates to/from)	\$	\$
Registration Fee (to represent CALS)	\$	\$
Miscellaneous (describe)	\$	\$
Miscellaneous (describe)	\$	\$

**Total**

	<b>TOTAL</b>	\$	\$
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<i>This a fair and accurate list of my expenses for which I am requesting reimbursement.</i>	Signature	Date
<i>Reviewed and Approved by:</i>	Signature	Date

\*CALS is a 501(c)3 charitable organization that provides life-saving education to rural healthcare providers. Your donation will be used to further that mission. A confirmation of your donation will be provided for your tax records.

\*\*The IRS recognizes charitable mileage at \$0.14/mile – your contribution record will reflect the number of miles driven, not a dollar amount.

**Return this completed form to:**

CALS Program, 717 Delaware Street SE, Suite 508, Minneapolis, MN 55414 : Fax 612-626-2352

## **CALS Travel Reimbursement Policy for Instructors**

Subject to the limitations listed below, CALS will reimburse instructors for ordinary and necessary business and travel expenses incurred while delivering program services for CALS. All other activities will be approved on an individual basis in advance by the Program Manager.

Instructors are expected to be prudent in spending the funds of CALS and to keep records and receipts regarding the organizational purpose of those expenditures. Instructors should neither gain nor lose personally because they incur reasonable business expenses.

### **TRAVEL, TRANSPORTATION AND PARKING**

When using a personal auto for conducting CALS business, mileage will be reimbursed at the current IRS rate. Only mileage between assigned business office or home location and business destination will be reimbursed.

When air travel is required in conducting CALS business, the least expensive class of airfare available (i.e., coach, economy, discount, etc.) will be reimbursed. Airfare is frequently priced based on how far in advance tickets are purchased. Instructors are expected to make reservations on a timely basis (i.e. 14 days or more in advance of travel) to prevent high airfares. To avoid potential penalties and change fees, every effort should be made to finalize travel dates and schedule times before a ticket is issued.

Travel to and from an airport (to a business destination, assigned office, or hotel) will be reimbursed. Parking expenses will be reimbursed when incurred while conducting CALS business and includes airport parking expenses incurred while traveling on CALS business.

The least expensive mode of transportation available will be reimbursed. For example, if an instructor chooses to drive to a destination rather than fly, but available airfare is cheaper than the mileage, the equivalent of the airfare (that meets the terms of this policy) will be reimbursed. Car rental or taxi service will be reimbursed only if it is the least expensive transportation available or if no other commercial transportation is available.

### **LODGING AND MEALS**

When an overnight stay is required in the course of conducting CALS business, expenses for lodging will be reimbursed. Expenses for a night's lodging will be reimbursed if departure from home or business is required to begin before 6:00 a.m. or if following the activity, the return to the home or business would be after midnight. Lodging rates will be limited to that of a standard single room in a moderately-priced hotel.

Meal expenses will be reimbursed if incurred during travel on CALS business requiring an overnight stay. Meal expenses (including tax and gratuity) must be itemized and will be reimbursed up to the maximum IRS meal rate per day for the location. Charges for alcohol will not be reimbursed. Room service meals will be reimbursed to the same extent as other meals. If meals are included as part of the activity, instructors will not be reimbursed for meals during that time period. During CALS sponsored events, instructors are expected to eat meals already provided as part of the event if available and work schedules permit. Hotel and meal charges for an instructor's personal guests should be tracked separately and will not be reimbursed.

### **SATURDAY NIGHT STAY**

Current pricing in the airline industry often provides substantially reduced airfare if the trip includes a Saturday night stay. Instructors are not required to stay through Saturday night simply to achieve a cheaper airfare. If the total cost that would be reimbursed to the instructor (airfare, hotel nights, meals, parking, etc.) is cheaper due to lower airfare achieved with a Saturday night stay versus a non-Saturday night stay, instructors have the option of staying over a Saturday. However, time not spent on CALS business or travel is considered personal time. Instructors should seek advance approval from the Program Manager if they prefer the option of extending their stay.

### **MISCELLANEOUS**

- Communication costs (phone, fax, expedited mail) are reimbursable if they relate directly to CALS business.
- If one or more overnight stays are required while on CALS business one personal phone call of 10 minutes or less in duration every three days will be reimbursed.
- Instructors enrolled in special mileage or hotel award programs may retain any benefits for their personal use; however, instructors must not book flights or hotel rooms that will be more costly to CALS in order to benefit from the award programs.
- Entertainment expenses that are not part of an official conference, program, or event will not be reimbursed.
- Incidental expenses, including items such as games, movies or between-meal-snacks, are considered personal and will not be reimbursed.

### **MECHANISM FOR REIMBURSEMENT**

All requests for reimbursement should be made to CALS office using CALS Travel Reimbursement Form within 30 days of completion of the activity. Expenses over \$25 will not be reimbursed without a receipt, except for mileage reimbursement. All expenses must be itemized on the reimbursement form regardless of their amount. In accordance with IRS rules, instructors must keep careful records of business purpose, date, and locations for all expenses.