

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

POLICY TITLE: IAHU Travel and Expense Reimbursement Policy  
CLASSIFICATION: Finance  
POLICY NUMBER: 10-05-F  
MOTION: Brett Thomas  
SECONDED: Tara Tandrow  
DATE APPROVED: December 2016  
SUNSET DATE: 2019

**PURPOSE:** To define the policies for travel and entertainment by members of the IAHU Board of Trustees, its committees, task forces, IAHU staff or others traveling at IAHU's expense for meetings where attendance has been requested or required. Each member is reminded that IAHU'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 IAHU expense reimbursement request form, which must include dates and business purpose of all travel and/or entertainment.
2. Receipts are required for all expenses of \$25.00 or more, but a receipt should be provided for every expense when possible. Expenses over \$25.00 not accompanied by a receipt may be refused. Receipts should detail the IAHU business purpose of the expense and list the individuals involved.
3. When traveling on IAHU business, the following expenses are eligible for reimbursement:

**A. Single hotel room rate and tax.** This will be billed to the IAHU master account when attending an IAHU function – Annual Convention. 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. Airport parking will be reimbursed at the lowest parking rate. Receipts must be provided.
- By car – Will be reimbursed at 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.** IAHU will reimburse a

maximum of \$25/day for all meals incurred by an individual traveling on IAHU business. Additionally this limit will apply per person if more than one person's meal expense 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 or for the cost of alcoholic beverages. IAHU will only reimburse for meals **not** provided during meeting or event. Meal reimbursement is only for those conducting valid IAHU business, and shall not be used to recognize and/or reward members or others. **Meal receipts need to have the food itemized and not just be the credit card receipt or they will not be reimbursed.**

**D. Expenditures on Members.** IAHU 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. IAHU 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").

**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.

5. IAHU officers or BOT members invited to IAHU chapter-sponsored events (sales symposia, monthly meetings, legislative conferences, etc.) to serve in an official capacity should not be charged registration fees by the sponsoring chapter. The IAHU officer or BOT member should clarify this with the chapter prior to the event.

6. IAHU travelers attending in a non-official and non-budgeted capacity will not be reimbursed for their expenses.

**Expense Submission Review.** The IAHU Executive Committee will be responsible for the implementation and administration of this policy. All individual expense items greater than \$100 may be reviewed by the Executive Committee prior to reimbursement. Any expense item under \$100 that is a questionable expense will likewise be reviewed by the committee. IAHU members may, with prior notice, request a policy exemption from the Executive Committee for a specific expense item. A IAHU member may appeal a reimbursement decision to the committee. **All expense reimbursement requests must be received by IAHU Executive Assistant within 60 days from the date incurred. Requests received after 60 days will require board approval.**

**FINANCIAL IMPACT:**

None.

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Date

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Attested by Secretary