

**NATIONAL ASSOCIATION OF BENEFITS AND INSURANCE PROFESSIONALS IDAHO
CHAPTER
POLICY & PROCEDURES**

POLICY TITLE:	NABIP Idaho Travel and Expense Reimbursement Policy
CLASSIFICATION:	Finance
POLICY NUMBER:	10-05-F
MOTION:	Terrie Trevino
SECONDED:	Phaedra Anderson
DATE APPROVED:	October 2024
SUNSET DATE:	2027

PURPOSE: To define the policies for travel and entertainment by members of the NABIP IDAHO Board of Trustees, its committees, task forces, NABIP IDAHO staff or others traveling at NABIP IDAHO's expense for meetings where attendance has been requested or required. Each member is reminded that NABIP IDAHO'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 NABIP IDAHO expense reimbursement request form, which must include dates and business purpose of all travel.
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 NABIP IDAHO business purpose of the expense and list the individuals involved.
3. When traveling on NABIP IDAHO business, the following expenses are eligible for reimbursement:

A. Single hotel room rate and tax.

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. All board members, other than NABIP IDAHO President, are limited to a maximum of \$250 mileage reimbursement, per event.
- By cab, Uber, Lyft – 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. NABIP IDAHO will reimburse a maximum of \$25/day for all meals incurred by an individual traveling on NABIP IDAHO 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. NABIP IDAHO will only reimburse for meals **not** provided during meeting or event. Meal reimbursement is only for those conducting valid NABIP IDAHO 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. NABIP IDAHO 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 NABIP members, volunteers or representatives. NABIP IDAHO 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. NABIP IDAHO officers or BOT members invited to NABIP IDAHO 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 NABIP IDAHO officer or BOT member should clarify this with the chapter prior to the event.

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

Expense Submission Review. The NABIP IDAHO 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. NABIP IDAHO members may, with prior notice, request a policy exemption from the Executive Committee for a specific expense item. A NABIP IDAHO member may appeal a reimbursement decision to the committee. **All expense reimbursement requests must be received by NABIP IDAHO Executive Assistant within 60 days from the date incurred. Requests received after 60 days will require board approval.**

FINANCIAL IMPACT:

None.

Date

Attested by Secretary