



## COMMISSION ON ACCREDITATION FOR RESPIRATORY CARE

### TRAVEL AND REIMBURSEMENT

**Policy:** Site visitors will be reimbursed for the usual and customary expenses directly related to conducting an on-site review as allowed by IRS regulations. All Site Visitors must set up direct deposit for reimbursement of site visit related expenses and provide a voucher and receipts electronically.

**Procedure:** The email you receive from the Executive Office for each on-site review will include a memorandum with the instructions for making your travel plans. Travel/expense reports should be submitted within two (2) weeks of completion visit and must include: the site visitor's name and address, the program number and location along with the date of the site visit, and the amount of each expense, categorized by line item on the Expense Report, along with any helpful/necessary supplemental descriptions and the related itemized receipt.

#### **Guidelines:**

1. As a CoARC Site Visitor, you are required to schedule your flight through the CoARC Travel Agent. The CoARC will reimburse for a basic economy main cabin seat with one bag. The charges can be billed directly to CoARC or they can be applied to your personal credit card reimbursement will occur upon submission of the Expense report and the receipt to the Executive Office. A copy of the flight schedule should be included.
2. You should make travel arrangements as early as possible. Team members must communicate prior to finalizing their reservations in order to coordinate arrival and departure times and thereby minimize ground transportation expenses. It is recommended that you check in to your flight as early as possible (for most airlines 24 hours before departure) so that you will learn as early as possible about any schedule changes. Note that any flight that costs more than \$900 must be approved by the CoARC Chief Operating Officer (COO) prior to making the reservation.
3. Site Visitors must follow through with the travel arrangements made by the CoARC Travel Agent prior to the site visit. If either limb of the flight was rescheduled for personal reasons, the site visitor will be responsible for any additional fees. If a site visitor has been preapproved to stay an extra night due to limited availability of flights, but is subsequently able to make an earlier flight, thereby avoiding the extra hotel and meal charges, the site visitor will not be responsible for the change fee. All flight changes made prior to the visit must be preapproved by the COO; a site visitor who makes same day changes (as noted above) should also attempt to notify the COO.
4. The "reimbursable expense period" starts when the site visitor would normally be expected to leave home to begin the trip and ends when the site visitor would be expected to arrive back home. *There are circumstances where traveling earlier than the day before, or on the afternoon/evening of the second day of a site visit the site visit would result in cost savings. Details of such circumstances must be submitted to the COO for approval prior to the visit.*
  - a. Expenses associated with personal travel before, during, or after the site visit are not reimbursable. If personal travel occurs within the "reimbursable expense period" (see above), site visit expenses will be reimbursed based on either 'usual and customary' expenses (as determined by the COO) or on expenses from which all personal travel costs have been excluded, whichever is less;
  - b. Trip or flight arrangements that are extended for personal reasons *must have* prior approval from the COO and the site visitor will be responsible for any additional costs related to that extension.
  - c. Expenses related to a non-visitor traveling companion are not reimbursable.



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- d. Airport parking is reimbursed only for the days within the “reimbursable expense period” (see above). Site visitors should look for low cost options.
5. When scheduling the site visit, the program director will provide some hotel recommendations. The Team captain will be responsible for selecting the hotel and making the reservations for both team members. Some programs may be able to secure hotel reservations at a low rate not available to the site visitors (i.e. available only to individuals associated with the program’s sponsor), in which case the program may make the reservation. If the lower rate is **ONLY** available when paid by the program sponsor, the team should allow the program to pay that expense but must provide that information on the expense report so that the Executive Office can reconcile the expenses with the program after the visit. If the discount is available regardless of payer, the site visitors should arrange to pay their hotel expenses at check-in. *Note that this should be clarified by the Team Captain prior to the visit.* Small expenses during the visit, (i.e. the visitors’ share of the Advisory Committee luncheon), may be paid directly by the program. The Team Captain must be fully aware of the last date on which a hotel reservation can be cancelled (generally 48 hours prior to arrival), as the last-minute postponement of a site visit can occur.
6. Purchases by site visitors for program personnel (e.g., dinner) are **not** reimbursable.
7. Itemized receipts must be submitted to the Executive Office along with the site visitor’s expense report within 10 days of the site visit. **Itemized receipts are required for all expenses (except tips) before reimbursement will be made;**
  - a. In the case of meals, the CoARC will reimburse up to an average of \$70 per day per visitor but only with itemized receipts. If one of the visitors pays for the meals of both visitors, that notation must be made on either the Expense Report or the receipt. Any exceptions must be approved by the COO;
8. **Ground Transportation:** Transportation to and from airports, hotels, and programs should be the lowest cost available – i.e. – hotel/airport shuttle, metro, taxi. Whenever feasible, site visitors should use prearranged transportation to/from the airport and hotel.
  - a. Site Visitors are prohibited from using their personal vehicle for CoARC business purposes **unless approved in writing prior to its use in special circumstances**. In addition, if the personal vehicle is used then there must be liability coverage of at least \$300,000 for each accident. Mileage is reimbursed at the current IRS rate per mile.
  - b. The **preferred rental car company is Enterprise**. Site Visitors are permitted to use a different car rental company as long as: (a) the cost is equal to or less than the cost of renting through Enterprise, and (b) the cost of the rental includes full Collision Damage Waiver and Liability protection of 100/300/50. CoARC will reimburse for rental of up to a full-size car. Site Visitors will be responsible for the cost difference if a car larger than a full-size (e.g. SUV) is rented. CoARC will reimburse the cost of fuel – receipts are required; rental cars must be refueled prior to return.
  - c. The Team Captain should coordinate the team’s arrival and departure to minimize ground transportation expenses. Each Site Visitor will only be reimbursed for costs acquired during the “reimbursable expense period” (e.g., rental fees, gasoline, and parking).
9. Special accommodations: any site visitor requiring special accommodations that would incur additional expenses must present those needs to the Chief Operating Officer for prior approval. Occasionally, circumstances beyond the control of the site visitor (e.g., inclement weather, canceled flight) will generate additional expenses. When possible, the site visitor should work with the CoARC Travel Agent or the COO to



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address this problem. Should such an issue arise during the trip, the site visitor should use his/her best judgment to find suitable, cost effective, alternatives.

10. The following expenditures are **Non-Reimbursable**: fees for upgrades of air, hotel, and auto rental costs, entertainment, personal travel, spousal/family expenses, limousine travel, credit card interest charges, laundry services, traffic citations, auto repairs for personal vehicles, optional hotel costs such as: charges for use of the hotel gym, in-room movies, personal phone calls, massage, sauna, or mini-fridge purchases, and valet parking, unless there is no “self-park” or self-parking is an unsafe option.
11. Exceptions to this policy must have the prior written approval of the COO.
12. Following a site visit, the CoARC will provide the program with a breakdown of each site visitor’s expenses. Individual receipts (copies or originals) are not provided.

Note: The Team Captain is responsible for the overall expense and cost-effectiveness of the site visit. The site visitors should exercise discretion and good business judgment for all expenses when representing the CoARC.