

Baltimore Research and Education Foundation, Inc.	Travel Policy	No.		1
		Effective Date		12/1/2009
		Revision Letter		C
		Final Approval Signature	Approved at the BREF Board Meeting, 1/26/2011.	

1.0 Purpose

The purpose of this policy is to establish the terms whereby the Baltimore Research and Education Foundation, Inc. (BREF) will support travel expenses for BREF employees and non-employees.

2.0 Scope

This policy applies to BREF employees and non-employees traveling with BREF support.

3.0 Policy

3.1 BREF’s mission is to further VA research and education. Relevant travel expenditures help accomplish the NPC’s mission. Accordingly, funds donated to and accepted by BREF may be used to reimburse travel expenses associated with furthering VA research and approved education activities.

3.2 Travel to research meetings of clinical specialty societies, research societies, national and international general clinical groups the primary goals of which are to further medical knowledge, research, public health and/or education is acceptable when the proposed travel has a demonstrable VA research relevance or is related to an approved staff or patient education activity.

3.3 Approval Authority: Approval of proposed BREF travel funding requests will be the responsibility of BREF’s administrators, with the final authority for interpretation residing with the president of the board of directors. Exceptions to stated policy may be made only by the designated authority or the board of directors.

3.4 Research and Education Relevance: It is the responsibility of the traveler to submit adequate documentation to justify a primary research purpose. If the travel is strictly for educational purposes, it must be documented as being work related instruction to improve performance of current duties; maintain or increase specialized proficiencies; or expand understanding of advances or changes in patient care, technology and health care administration.

3.5 BREF-funded travelers who are VA employees must attach a copy of completed VA form 0893 “Advance Review of Offer to Donate Support for Official Travel” and obtain VA travel authorization as required by VA policy. As a general rule, BREF will not reimburse travel conducted on annual leave. Exceptions will be made only by the president of the board of directors or the executive director.

3.6 All BREF-funded travelers must complete and submit a BREF “Travel Authorization” form to the BREF office in ample time for approval signature to be obtained prior to travel. A meeting agenda/invitation or course outline must accompany the authorization form, as well as a copy of the completed VA form 0893 with approvals, if applicable.

3.5 Advance Payments: No cash advances or reimbursement of transportation tickets will be made prior to the date of the actual travel. All travel expenses must be paid by the traveler and will be promptly reimbursed upon completion of approved travel. Travelers who find the personal pre-payment of transportation a hardship may direct a request to the executive director to be reimbursed prior to travel.

3.6 Payment of conference registration fees may be requested in advance. BREF checks for such registrations will be made out to the organization sponsoring the meeting, not the individual traveler.

3.7 Meals and incidentals: In accordance with an IRS Accountable plan, meals and incidentals will be reimbursed at the prevailing federal per diem rate for the destination city. No receipts are required for meals and incidentals. Travel days will be reimbursed at 75% of the per diem rate. As an alternative, meals may be reimbursed at actual cost as evidenced by receipt as long as they do not exceed the federal per diem rate. Travelers are not to request per diem reimbursement for any meal that was provided by the meeting and included in the registration fee.

3.8 Hotel Charges: Travelers will be reimbursed for reasonable hotel room costs as determined by the meeting site and prevailing hotel rates. Travelers are asked to obtain the Federal-approved hotel rates if they are available. The original itemized hotel bill must be submitted with the reimbursement request. Reimbursement will be made for reasonable laundry and dry cleaning costs if the hotel stay is five nights or more.

3.9 Transportation: Maximum transportation reimbursement shall be limited to the most reasonable method of travel, usually coach air fare. Use of private automobiles must be approved in advance by the executive director. When authorized, reimbursement will be made at the prevailing federal mileage reimbursement rate plus applicable tolls. In no case will reimbursement for use of private automobile exceed the coach air fare to the location in question. Actual odometer readings or MapQuest (or equivalent) mileage estimates will be required for reimbursement.

3.10 Ground Transportation: Ground transportation will be reimbursed at cost based on submission of original receipts. Reimbursements are limited to travel to and from the city-of-departure airport/train station plus parking; from airport/train station to hotel, and hotel to airport/train station. A receipt is required for parking charges. After the traveler has arrived at the hotel, taxi cabs will not ordinarily be reimbursed (to go out for dinner, etc.). Because meeting hotels are generally within walking distance of the conference site or provide free shuttle service to the conference site, any other cab fares requested

will require a separate justification attached to the traveler’s reimbursement request. These taxi exceptions will be reviewed and approved by the executive director on a case-by-case basis.

Use of a rental car may be authorized, but only if approved by the executive director with valid justification.

3.11 BREF employees should code their travel days as “Authorized Absence” on their BREF timecard.

3.12 On return, travelers complete a “BREF Travel Expense Statement” and attach all receipts and submit it to the BREF office within five business days. Travelers will be promptly reimbursed after we receive this form and all necessary receipts.

3.13 Automobile mileage for authorized travel is computed using the current federal rate. Commuting to work is not a travel expense and will not be reimbursed.

4 Definitions

Federal **per diem** rates may be found at www.gsa.gov.

Reference: 5 USC 4111

Forms: Procedures – See Appendix A

Travel Request/Authorization Form – See Appendix B

Travel Reimbursement Request Form – See Appendix C

VA Form 0893 – <http://vaww.va.gov/vaforms>

(type in VA0893 to retrieve the form) – See Appendix D

5 Responsibilities

5.5 **Travelers** are responsible for submitting the Travel Request/Authorization Form and the research justification or Education Committee approval to the BREF office at least 2 weeks before beginning travel. The Travel Reimbursement Request and all applicable original receipts and split support documentation, if applicable, must be submitted to the BREF office within a reasonable amount of time after completing travel.

5.6 **BREF staff** members are responsible for reviewing all Travel Request/Authorizations forms. Reimbursement will be paid within two weeks of receipt of all necessary documentation.

5.7 **The Executive Director** is the approving official.

6 Revision History

Revision Date	Revision Letter	Name of Document Author	Description of Change
10/23/2008	A	Heather Riley	Put policy into approved format

12/1/2009	B	Shirley Rutledge	Made NAVREF and VA suggested changes
1/26/2011	C	Shirley Rutledge	Made BREF Board-suggested changes. Approved at the BREF Board meeting, 1/26/2011.

Procedures

1. Travelers complete and submit to the BREF office the BREF Travel Request/Authorization form, along with applicable supporting documentation including meeting agenda or documentation. VA employees must attach a completed copy of VA form 0893 as to comply with VA policy. The forms are submitted to the accountant in the BREF office in Room 3A-125 of the Baltimore VAMC.
2. BREF accountant reviews all documentation for completeness and compliance with BREF's travel policies. The accountant contacts the traveler by phone or email to resolve any missing information, answer questions, etc.
3. The accountant gives the travel request information to the Executive Director for review and signature.
4. The Executive Director reviews the completed travel Request/Authorization form and approves or disapproves the request.
5. The Executive Director returns the Travel Request/Authorization forms to the accountant.
6. The accountant follows up with the traveler to resolve outstanding issues or to inform them that their travel was denied.
7. The accountant files the approved travel authorization forms in a temporary file until the travel is complete and reimbursement forms have been submitted.
8. Any applicable meeting registration forms should be submitted to BREF in ample time so that payment can be made directly to the meeting sponsor before registration deadlines.
9. Upon return from travel the traveler completes BREF travel reimbursement request form and submits the form and original travel receipts to the accountant.
10. The accountant reviews the reimbursement request, substantiates the receipts and, when all is in order, prepares a reimbursement check.
11. The Executive Director verifies that the payment is correct and signs the check along with one additional check signer.
12. Depending on the Traveler's preference, the accountant emails or calls the traveler that reimbursement is available for pick up or addresses and mails the check to the Traveler.

**BALTIMORE RESEARCH AND EDUCATION FOUNDATION
Travel Authorization Form**

Date _____

Please allocate \$ _____ from _____
(estimated amount) (identify which BREF account)
for _____ to attend
(name of traveler)

_____ *
(name or description of meeting)

to be held in _____ on _____
(city, state) (dates)

Scheduled departure: _____,
(date) (approximate time)

Return _____,
(date) (approximate time)

Describe the research or education justification for this travel _____

***A program outline or meeting agenda must be attached to this form.**

CHECK ONE:

A. Traveler is an employee of BREF.

B. Traveler is a VA employee traveling on Official Duty or VA Authorized Absence. VA employees receiving BREF travel reimbursement must attach a copy of their completed VA Form 0893 "Advance Review of Offer to Donate Support for Official Travel" to this request.

VA employees traveling outside of the United States using BREF funds must contact the VA Travel Policy Division to obtain a government passport, if applicable.

The local travel office or the VHA Travel Office should be consulted if there is a question as to the status of a VA traveler. VA employees must follow VA travel policies.

VA employees are responsible for accepting travel reimbursement in accordance with federal laws, regulations and VA policies regarding acceptance of non-federal travel support under section 1353 of title 31, U.S.C. or section 4111 of title 5, U.S.C.

C. Other (explain status).

Travelers being reimbursed by BREF are not to use government credit cards for travel expenses.

Is part of this travel being paid by another organization? yes no

Signature of BREF investigator

Travel Approved: _____
Executive Director

