



## TRAVEL REIMBURSEMENT GUIDELINES

Amended April 8, 2008

As part of your service as an MOA officer, committee member or executive director, you may occasionally be expected to attend various functions, meetings, or events which will require you to travel. Listed below are the guidelines you should follow in order for the MOA to reimburse you for the expenses you incur while conducting business on behalf of the Montana Optometric Association.

### I. AUTHORIZATION/APPROVAL:

- A. Theft, loss or damage to personal property while traveling on MOA business is your personal responsibility, and you should check with your insurance agent prior to travel. MOA is not liable for personal property losses.
- B. Make sure you have written authorization prior to incurring any expenses or conducting any travel on MOA business. This authorization will consist of a RFR (Request For Reimbursement) approved by the appropriate member of the MOA Board of Directors or MOA Secretary-Treasurer. You will use this form to submit your reimbursement request at the conclusion of the trip.

### II. TRANSPORTATION REIMBURSEMENT GUIDELINE:

- A. AIR TRAVEL
  - 1. Air travel is reimbursed based on your cost for the properly issued discounted coach-class ticket. To stretch travel funds, always attempt to obtain a SuperSave-type fare.
  - 2. You should purchase the tickets on your own and receive reimbursement when you submit your RFR.
    - a. To be reimbursed for your flight expenses, you must attach a copy of your ticket to your RFR.

**B. GROUND TRAVEL:**

1. When auto travel is used, reimbursement is calculated at the IRS mileage reimbursement rate (per mile) at the start of MOA's fiscal year; but reimbursement for mileage, meals, hotels and tolls to and from the destination may not exceed equivalent airline discounted coach-class ticket, parking and ground transportation charges to and from the destination.
2. When available, always use the airport/hotel shuttle service to transport you to and from the hotel and airport. Cab rides are permitted if the shuttle service is unavailable. All transportation charges in excess of \$1.00 must include a receipt for reimbursement. Luxury or personal limousine expenses are not reimbursable.
3. Park your car in the airport's long-term parking lot if you will be gone more than one day. You will need a receipt to be reimbursed for your parking expenses.
4. No reimbursement will be made for car rentals unless prior written request is made and approval granted by the appropriate MOA Board Member on the RFR form.

**III. MEAL REIMBURSEMENT GUIDELINES**

- A. The MOA will reimburse you for your actual daily meal expenses up to a maximum of \$50.00 per day. Actual costs should always be indicated on the RFR.
- B. Transportation expenses to and from the restaurant are considered part of your \$50.00 per day maximum. (i.e., cab would be reimbursed only if you have funds left from the total meal allowance.)
- C. Gratuity expenses are considered part of your \$50.00 per day maximum.
- D. Should meal costs for one day exceed \$50.00, they may be reimbursed as long as the meal reimbursements for the entire trip do not exceed \$50.00 multiplied by the number of days you are on business.
- F. The MOA will not reimburse you for any meal functions or costs when paying for someone other than yourself. (In other words, don't "pick up the tab" for your entire group - each must pay his or her own expenses.)

- G. When meals are provided by MOA to a member traveling on MOA business, deductions in the \$50.00/day meal allowance will be made as follows: \$10.00 for breakfast, \$10.00 for lunch or \$30.00 for dinner. (Example, if the MOA meeting includes a luncheon, your remaining food allowance for the day will be \$40.00.)

#### IV. HOTEL REIMBURSEMENT GUIDELINES

- A. Always request a basic room when traveling on MOA business. As a general rule, meetings are usually held in first-class hotels and the average room will be adequate for your lodging needs. If, prior to your arrival, room reservations or the room rate has not been established, request the hotel's lowest corporate rate during check-in. MOA reimburses single rate only.
- B. In most cases, you will be required to pay all room charges upon check-out. You will receive reimbursement for these expenses upon submission of your RFR.
- C. In rare instances when you are listed on an MOA Master Account, the MOA will be automatically billed for the room and tax charges only. You will still be responsible for other expenses charged directly to your room (room service meals, phone calls, laundry, etc.)

#### V. MISCELLANEOUS REIMBURSEMENT

- A. If you are traveling with several pieces of luggage and must tip the bellboy, shuttle driver, sky captain, etc., these expenses should be listed under the "other" section of your RFR.

#### VI. SUBMITTING THE PAPERWORK FOR REIMBURSEMENT

- A. Within 30 days after the conclusion of your trip, you must submit a properly completed RFR. Include all receipts that you have gathered. As a rule, receipts are required for reimbursement of the following:

1. All parking charges;
  2. Airline tickets;
  3. Hotel lodging;
  4. Any transportation service over \$10.00
- B. Please complete all portions of your RFR. Members of the MOA staff are not responsible for filling in missing portions of your RFR. Remember to sign the bottom of the RFR in order for the paperwork to be processed.
- C. You will generally receive your reimbursement check within two weeks after the MOA office receives your completed RFR.

Your assistance in following these procedures will help the MOA control expenses associated with conducting MOA business. Any questions concerning the MOA's reimbursement policies should be directed to the MOA Executive Director or Secretary/Treasurer at 36 South Last Chance Gulch, Suite A, Helena, MT 59601 or phone (406) 443-1160.