



TITLE
TRAVEL, HOSPITALITY, AND HOSTING

DOCUMENT #
1122

INITIAL APPROVAL DATE
October 15, 2009

APPROVAL LEVEL
Alberta Health Services Executive Committee

INITIAL EFFECTIVE DATE
October 15, 2009

SPONSOR
Finance

REVISION EFFECTIVE DATE
September 22, 2011

CATEGORY
Financial Stewardship

NEXT REVIEW
September 22, 2014

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PURPOSE

- To set out the criteria for the approval, arrangement, and reimbursement of Travel, Hospitality, and Hosting related expenses which support Alberta Health Services' ("AHS") business operations.

POLICY STATEMENT

AHS is committed to ensuring Travel, Hospitality, and Hosting expenses incurred benefit and enhance clinical and business services. Processes for the approval, arrangement, and reimbursement of Travel, Hospitality, and Hosting shall reflect AHS' responsibility for the sound financial management of funds and ensure individuals are adequately reimbursed for their expenses.

Compliance with this policy is a shared responsibility among the individual incurring the expense, the designated signing authority ("the approver"), and the Accounts Payable Department ("AP Department").

APPLICABILITY

This policy applies to Travel, Hospitality, and Hosting undertaken on behalf of AHS. Compliance with this policy is required by all AHS employees, members of the medical and midwifery staffs, students, volunteers, and other persons acting on behalf of AHS (including contracted services providers as necessary). This policy is subject to all applicable laws.

Applicable employment contracts, collective agreements, or letters of offer shall take precedence in the event of a conflict with this policy.

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POLICY ELEMENTS

1. Approval

- 1.1 Travel approval shall be granted provided the Travel is:
 - a) justified by an operational requirement;
 - b) relevant to the individual's roles and responsibilities within AHS; and
 - c) an efficient and/or effective means of obtaining the information or benefit.
- 1.2 All Travel requires the prior approval from the approver as set out in the Delegation of Authority for Financial Commitments Authorization Table ("authorization table").
- 1.3 Approval for Travel, Hospitality, and Hosting funded by external entities shall not be granted unless it:
 - a) a condition of an approved contractual obligation; or
 - b) has received the approval of the Executive Committee or the AHS Board.
- 1.4 Individuals undertaking Travel, Hospitality, and Hosting shall avoid real or perceived conflicts of interest.

2. Reimbursement

- 2.1 AHS shall reimburse Travel-related expenses, including, but not limited to meals, accommodation, and transport in accordance with this policy. Additional information regarding Travel expenses and reimbursement can be found in the Travel User Guide.
- 2.2 Claims for reimbursement of Travel, Travel advances, and Hospitality or Hosting expenses shall be submitted on a completed and signed Travel and Employee Expense Claim form (#09704) that has been approved in accordance with the authorization table. Use of an electronic signature/approval is permitted; using a physical signature stamp (or similar device) is prohibited.
- 2.3 AHS shall not reimburse Travel-related expenses including, but not limited to:
 - a) interest charges on outstanding credit card balances;
 - b) entertainment videos and movie channels;
 - c) spa and fitness centre expenses;
 - d) traffic and parking fines;
 - e) liquor and bar bills;
 - f) in-room amenities not included in the cost of the room (e.g. mini bar);
 - g) loss of money or personal effects;
 - h) expenses resulting from failure to cancel transportation or hotel arrangements;
 - i) voluntary additional days beyond the business purpose of the trip (excluding excursion flights requiring a Saturday overnight stay);

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- j) valet parking charges; and
- k) flight cancellation insurance.

- 2.4 Travel to and from educational events for which prior approval has been obtained shall be reimbursed in accordance with this policy. Approval to Travel to and from an educational event does not constitute approval to attend the educational event.
- 2.5 Travel undertaken on behalf of a research initiative, project, or grant shall be funded or reimbursed through the respective budget for that initiative, project, or grant unless otherwise indicated by an agreement or contract.
- 2.6 Requests for reimbursement of Travel expenses incurred in emergent circumstances, and for which prior authorization is normally required, shall be considered on a case-by-case basis, and requires the approval of the relevant portfolio Vice President, in accordance with the authorization table.
- 2.7 Individuals required to Travel regularly are eligible to apply for an AHS Purchasing Card ("P-Card") in accordance with P-Card program requirements and the respective department's operational requirements.

3. Meal Expenses

- 3.1 Meal expenses are the actual cost of a meal to the maximum set out in Appendix "A". The actual cost of the meal includes up to 15% gratuity and GST, and excludes alcoholic beverages.
- 3.2 A per diem rate shall be paid when a submitted claim is not supported by receipts. When receipts support a submitted claim, the actual cost of the claim shall be paid, up to the maximum per diem rate.
- 3.3 On written approval by the respective Vice President, reasonable expenses beyond the per diem may be reimbursed provided the claim submitted is for all actual meal expenses incurred during the whole period of absence. When the claim submitted is not for all actual meal expenses, only the per diem will be paid.
- 3.4 The most senior individual shall pay and claim the expense for a group business meal when the meal is to be paid by one individual. The names of individuals who participated in the group meal must accompany the expense claim. Non-paying attendees are not eligible to claim a meal allowance in this instance.
- 3.5 No meal expense can be claimed if the meal is included as part of an airfare or as part of registration or conference fees.

4. Vehicles and Mileage

- 4.1 AHS shall:

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- a) reimburse business use of privately-owned vehicles at the rates set out in Appendix "A", unless otherwise specified in a current collective agreement, employment contract, or in a letter of offer;
 - b) not reimburse for regular commuting between an employee's place of residence and their Designated Home Site or the first and last destination within the same city or town limits; and
 - c) reimburse for AHS-approved business Travel occurring between sites which falls between the first and last business of the working day, except for as noted in 4.1(b) above.
- 4.2 Use of privately-owned vehicles for AHS-approved business is considered a requirement if the use is set out in the terms of a new or amended employment contract, collective agreement, or in a letter of offer.
- 4.3 When the use of a privately-owned vehicle is required under the terms of a new or amended employment contract, collective agreement, or in a letter of offer, AHS shall reimburse the increased cost of the business insurance coverage only (see Appendix "B").

5. Travel Advances

- 5.1 Travel advances may be requested when Travel expenses are projected to exceed \$500.00 in total. Where possible, requests for Travel advances must be submitted to the approver at least three (3) weeks prior to the travel date.
- 5.2 At the completion of Travel for which an advance was provided, the individual shall complete and submit the Travel Approval (Out of Province Only)/Request for Advance form to reconcile the expenses with the advanced funds. The form shall then be sent to the approver for review and validation.
- 5.3 If the advance is greater than the total expenses incurred or if the Travel did not occur, the full amount of the remaining advance shall be repaid with a personal cheque payable to AHS.

6. Hospitality and Hosting

- 6.1 Hospitality and Hosting may be undertaken to advance AHS' mission, vision, and values.
- 6.2 Only direct reports to a Senior Vice President or an Executive Vice President may initiate Hospitality and Hosting.
- 6.3 Approval for Hospitality and Hosting expenses shall be in accordance with the Delegation of Authority for Financial Commitments policy (#1118).
- 6.4 Hospitality and Hosting carried out by AHS may include, but is not limited to, the following:

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- a) government officials;
- b) dignitaries;
- c) donors;
- d) guests of or visitors to AHS;
- e) public interest groups;
- f) foundations, auxiliaries, and trusts;
- g) other private, public, or non-profit entities or organizations; and
- h) prospective employees.

6.5 Hospitality and Hosting expenses eligible for reimbursement may include, but not be limited to:

- a) meals and entertainment;
- b) non-alcoholic beverages;
- c) transportation;
- d) accommodation; and
- e) incidental expenses.

6.6 Prior approval of the:

- a) President and Chief Executive Officer is required for reimbursement of otherwise ineligible expenses; and
- b) Chair of the AHS Board is required for reimbursement of otherwise ineligible expenses of the President and Chief Executive Officer.

6.7 The most senior individual with approval to hold Hospitality and Hosting events shall pay and claim the expense. All Hospitality and Hosting expenses shall be itemized on the Travel and Employee Expense Claim form (#09704) and supported by the necessary receipts. The names of individuals who attended the events must accompany the expense claim and necessary receipts.

7. Responsibilities

7.1 Individual Responsibilities

- a) Individuals incurring Travel, Hospitality, or Hosting expenses on behalf of AHS shall minimize expenses through means such as, but not limited to:
 - (i) using available technology (e.g. videoconference, teleconference, or internet);
 - (ii) using the most cost-effective methods of travelling;
 - (iii) coordinating Travel arrangements when more than one person from the same area is travelling to the same destination; and
 - (iv) using fleet vehicles, where available.
- b) Individuals shall ensure requests for reimbursement of Travel expenses, Travel advances, and expenses related to Hospitality and Hosting are:

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- (i) submitted to the designated approver on a completed Travel and Employee Expense Claim form (#09704);
 - (ii) signed at least one level of signing authority higher than the individual submitting the request; and
 - (iii) supported by applicable documentation when necessary.
- c) No individual may approve his/her own Travel expense claim.
- d) Individuals shall:
- (i) ensure claims for reimbursement of expenses are submitted to the designated approver in the fiscal year in which they are incurred (i.e. prior to March 31); and
 - (ii) take all reasonable steps to ensure claims for reimbursement are submitted to the designated approver within the same fiscal quarter in which they are incurred.

7.2 Approver Responsibilities

- a) Approvers shall approve claims for reimbursement of expenses in accordance with the Delegation of Authority for Financial Commitments policy (#1118).
- b) Prior to approving claims for reimbursement, the approver shall take necessary steps to ensure claims:
 - (i) comply with the requirements of this policy, applicable collective agreements, and employment contracts;
 - (ii) are directly related to AHS business;
 - (iii) are in accordance with internal budget(s);
 - (iv) are accurately completed, signed, and correctly coded; and
 - (v) are supported by supplementary documentation (as required).
- c) The approver shall submit signed Travel and Employee Expense Claim form directly to the AP Department for processing.

7.3 AP Department Responsibilities

- a) The AP Department shall:
 - (i) process expense claims in a timely manner; and
 - (ii) conduct periodic audits to ensure compliance with this policy and report audit results to Senior Management and may be reported to Internal Audit.
- b) Only claims for reimbursement that are properly completed, signed, coded, and supported by supplementary documentation, as required, will be processed. The AP Department may return any expense claim which has not been properly completed.

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8. Dispute and Grievance Resolution

Disputes and grievances related to any aspects of Travel, Hospitality, and Hosting shall be directed to the approver. The approver shall review the dispute or grievance and make a determination. The decision of the approver is final and not subject to appeal, except where permitted by law or legislation.

DEFINITIONS

Designated Home Site means the facility or office considered to be an employee's primary work location as determined by AHS Payroll.

Hospitality and Hosting means an activity, event, or acknowledgement involving officials from government departments, dignitaries, donors, contractors, guests, visitors, or prospective employees to AHS, public interest groups, foundations, auxiliaries, and trusts, or other private, public, or non-profit entities or organizations.

Travel means the movement from one place to another for the purpose of accomplishing AHS-approved business for which an individual requires reimbursement. The expenses associated with Travel eligible for reimbursement are as outlined in this policy.

REFERENCES

- Appendix "A" – Travel and Reimbursement Rates
- Appendix "B" – Insurance for Privately-Owned and Rented Vehicles
- AHS Bylaws, Policies, and Procedures:
 - Conflict of Interest Bylaw
 - Delegation of Authority for Financial Commitments policy (#1118)
 - Authorization Table
 - Records Management (#1133)
 - Records Retention Schedule (#1133-01)
- Form: Travel and Employee Expense Claim (#09704)
- Form: Travel Approval (Out of Province Only)/Request for Advance
- Travel User Guide
- Purchasing Card Program User Guide
- Public Service Subsistence, Travel and Moving Expenses Regulation (Alberta)

REVISIONS

March 8, 2010
July 13, 2010
February 15, 2011
September 22, 2011

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APPENDIX "A"

TRAVEL AND MEAL REIMBURSEMENT RATES

The reimbursement rates listed below are for out of scope individuals and may not reflect the rates set out in applicable employment contracts, collective agreements, or letters of offer. Applicable employment contracts, collective agreements, or letters of offer take precedence in the event of a conflict with this chart and policy.

Expense Type	Reimbursement Rate
Mileage	\$0.505/km
Meal Per Diem	\$43.00/day
Breakfast	\$10.00
Lunch	\$12.00
Dinner	\$21.00
Accommodation	
w/ receipt	Actual cost
w/o receipt	\$20.00/night
Vehicle Insurance	Up to \$500.00/annum

The actual cost of meals includes applicable taxes, up to a 15% gratuity, and excludes alcohol.

Reasonable laundry and/or dry-cleaning expenses may be claimed after forty-eight (48) hours of continuous absence while on AHS-approved Travel.

Reasonable parking expenses may be claimed while travelling on AHS business.

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APPENDIX "B"

INSURANCE FOR PRIVATELY-OWNED AND RENTED VEHICLES

1. Business Insurance for Privately-Owned Vehicles

- 1.1 The increased cost of insuring a privately-owned automobile for the purposes of conducting AHS-approved business shall be reimbursed for the exact cost of the business insurance up to a maximum of \$500.00 per year (or pro-rata if insurance is for less than a year).
- 1.2 Claims for reimbursement of business insurance shall be submitted to the approver on a completed Travel and Employee Expense Claim form (#09704) and shall be supported by proof of insurance coverage and premium payment. Approved Travel and Employee Expense Claim forms shall be sent to the AHS Insurance Department for validation and to the AP Department for processing.
- 1.3 Vehicle owners are responsible for any losses that may arise, including, without limitation:
 - a) the repair costs of any vehicle damage;
 - b) loss of personal property; and,
 - c) liability claims resulting from accidents in privately-owned vehicles while on AHS business.
- 1.4 AHS' Insurance Department of Legal & Privacy (insurance@albertahealthservices.ca) shall be notified of any accidents resulting in injury to AHS staff, third parties, or damage to other vehicles or property which occurs during Travel while on AHS-approved business.

2. Insurance for Rental Vehicles

- 2.1 AHS employees shall ensure they have sufficient insurance coverage to limit liability arising from renters' responsibility for physical damage (e.g. vehicle collisions, hail, collisions with wildlife, vandalism, fire) while a rental vehicle is in their possession.
- 2.2 The preferred order for insurance coverage when renting a vehicle is set out below:
 - a) Rent the vehicle using a personal credit card, AHS P-card, or other credit card that provides rental vehicle loss/damage insurance. The collision waiver in the rental contract must be declined for the credit card insurance to take effect. If damage is sustained to the rental vehicle, the claim can be reported to the credit card insurance company;
 - b) Decline the collision waiver coverage in the rental contract. If damage occurs, AHS has automobile insurance coverage for "Legal Liability for Damage to Non-Owned Automobile". This coverage is subject to a \$1,000 deductible. If damage is sustained, the rental agency typically repairs the damage and pursues recovery from the renter. Report the claim to insurance@albertahealthservices.ca

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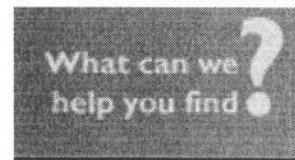
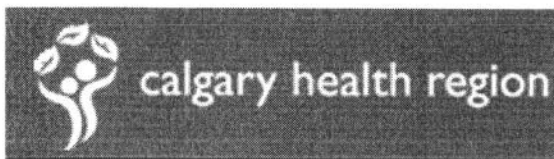
and a report of the claim will be made to our auto insurers. Payment of the \$1,000 deductible would be made from the employee's business unit budget; or,
c) Purchase the collision waiver in the rental contract. There are several exclusions, so not all causes of damage/circumstances are covered. Expenses incurred for this option are reimbursable and shall be submitted to the approver on the Travel and Employee Expense Claim form (#09704).

- 2.3 When a vehicle is rented to conduct AHS-approved business, AHS shall reimburse the cost of the collision (or loss) damage waiver ("collision waiver") in the rental contract if the collision damage waiver was purchased.
- 2.4 Questions or concerns regarding business insurance for privately-owned vehicles or insurance for rental vehicles can be directed to the AHS Insurance Department at insurance@albertahealthservices.ca.

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new policy



Regional Policy

Subject/Title <p style="text-align: center;">Travel Approval and Reimbursement</p>	Reference Number: <p style="text-align: center;">1428</p>
Approving Authority: <p style="text-align: center;">Executive Management</p>	Effective Date: <p style="text-align: center;">2000/08/01</p>
Classification: <p style="text-align: center;">Corporate Accountability and Finance</p>	Date Revised: <p style="text-align: center;">2005/06/09</p>

[Feedback](#)

Reason For Policy

- To facilitate the sound stewardship of funds allocated by the Calgary Health Region (“the Region”) for travel purposes.
- To provide guidelines and standards for staff members who travel or who authorize travel arrangements.
- To provide uniform criteria for approving discretionary out-of-province travel (see Appendix A).
- To provide information on the Region Travel Procedures and Requirements (see Appendix B).

NOTES TO READER

The “Approved Criteria for Out-of-Province Travel” and the “Travel Procedures and Requirements” in Appendixes A and B are integral parts of this policy.

Underlying Principles

1. PUBLIC ACCOUNTABILITY

The Region is accountable to the Minister of Health and Wellness and the public for the appropriate use of limited travel funds. The purpose of travel and related expenses must be consistent with the Region’s mission and requirements.

2. SUPPORT FOR STAFF TRAVEL

Travel is an essential part of operating in a multi-facility environment. The Region is committed to supporting and assisting staff members who must travel as a result of their functions and duties within the Region. At a minimum, this support and assistance will consist of reimbursement of travel expense claims, and the services of the Calgary Health Region Corporate Travel Assistant and a designated travel agency (for emergencies only.)

3. DISTINCTION BETWEEN ESSENTIAL AND DISCRETIONARY TRAVEL

The Region is required to set priorities and make sound decisions in the allocation of limited funds for essential health services. Accordingly, the Region is required to make a distinction between ESSENTIAL TRAVEL within the region or province for service

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delivery and business purposes and DISCRETIONARY TRAVEL to other destinations for the purpose of meetings, education, conferences and information gathering.

4. ECONOMIC LIMITS

The Region is funded on a global basis to fulfill a broad and diverse mandate. The Region is required to maximize the funds and resources available for care and service to people. As a result, the Region must establish economic limits and set cost control guidelines for travel expenses.

5. FAIRNESS, REASONABLENESS AND SENSITIVITY

The Region must be fair, reasonable and sensitive to public perception in its decisions to approve travel that is non-essential; i.e. discretionary. The Region must be prepared to make such decisions in an open and accountable manner based on standard criteria (see Appendix A).

6. RESTRICTIONS ON TRAVEL FUNDED BY VENDORS, SUPPLIERS AND PROVIDERS

In order to maintain the principles of fairness and impartiality, the Region will not accept any funds from current or potential contractors, vendors, suppliers or providers of goods or services for the purposes of travel and/or accommodation by any Region staff member or person acting on behalf of the Region.

Policy Statement

1. APPROVAL FOR TRAVEL

1.1. Region staff may travel for work-related purposes WITHIN THE CALGARY HEALTH REGION without advance approval; however, the reimbursement of travel costs must be approved by the appropriate Expenditure Officer.

1.2. Region staff may travel for work-related purposes WITHIN ALBERTA with the approval, in advance, of the designated Expenditure Officer for their functional centre.

1.3. With the approval, in advance, of the appropriate Expenditure Officer at the Executive Director or Medical Director level, Region staff may travel for work-related purposes WITHIN CANADA.

1.4. With the approval, in advance, of the appropriate Expenditure Officer at the Vice President or Executive Medical Director Level, Region staff may travel for work-related purposes WITHIN CANADA AND THE UNITED STATES.

1.5. With the approval, in advance, of the appropriate Expenditure Officer (Executive Vice-President and Chief Clinical Officer), Region staff may travel for work-related purposes OUTSIDE NORTH AMERICA.

1.6. The Travel/Education Expense Claim (form #10035 R 03/12) must be used for travel requiring approval in advance.

2. RESTRICTIONS ON EXTERNALLY FUNDED TRAVEL

Approval shall not be granted for travel which is to be funded by a current or prospective vendor, supplier, or provider of goods and services to the Region. This restriction does not apply to travel and accommodation funded by government,

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government agencies, voluntary (not-for-profit) organizations, professional/scientific associations and conference organizers.

3. CRITERIA FOR APPROVING DISCRETIONARY TRAVEL

The approval of discretionary travel is subject to the principles of sound stewardship in the use of public funds (see Appendix A). Before approving requests for travel, Expenditure Officers must satisfy themselves that:

- The travel will produce substantial benefit to the Region;
- There is no other preferable means of obtaining the knowledge or benefit (i.e., from professional colleagues or published literature);
- The travel is economically justified (i.e., it is the most efficient and effective means of obtaining the information or benefit);
- Priority will be given to ESSENTIAL travel. DISCRETIONARY travel will be approved depending on funds available and the benefits identified.

4. AUTHORITY OF EXPENDITURE OFFICERS AND ACCOUNTING OFFICERS

Travel reimbursement requests require the approval of the appropriate Expenditure Officer and authorization of the appropriate Accounting Officer. A person may not act as both an Expenditure Officer and an Accounting Officer with respect to the same travel approval or reimbursement transaction. The travel reimbursement requests of the Chief Executive Officer are subject to the approval of either the Chief Financial Officer or Board Chair.

5. EXTENUATING CIRCUMSTANCES

In the event of special circumstances not contemplated by this policy, a Vice President, Executive Director or Medical Director may approve travel expenses or travel allowances.

6. USE OF CALGARY HEALTH REGION CORPORATE TRAVEL ASSISTANT AND THE DESIGNATED TRAVEL AGENCY

The Calgary Health Region Corporate Travel Assistant and the Designated Travel Agency, used for emergencies only, provides personalized service to all staff required to travel on Region business and will arrange all Region business and/or conference travel reservations. This includes airline bookings, hotel accommodations and car rental in accordance with this policy.

7. DESIGNATION OF TRAVEL COORDINATOR

Department groupings or portfolios will designate "TRAVEL COORDINATOR(S)" to organize staff travel arrangements in accordance with this policy. Departments are required to register their department/portfolio Travel Coordinator with the Corporate Travel Assistant.

8. TRAVEL ADVANCES

Travel advances, for a reasonable amount consistent with the nature and duration of the trip, will be provided with approval from the appropriate Expenditure Officer using the Travel/Education Expense Claim (form #10035 R 03/12). For trips of a short duration, staff members are expected to cover the travel expenses and obtain reimbursement following completion of the trip using the Travel/Education Expense Claim (form #10035 R 03/12).

9. MAXIMUM REIMBURSEMENT LIMITS

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Maximum reimbursement limits (in Canadian funds) have been established for various types of travel expenses. See Schedule A.

10. EXPENSES NOT COVERED BY THE CALGARY HEALTH REGION

Expenses that will not be paid or reimbursed by the Region include the following:

- Interest charges on outstanding credit card balances
- Entertainment videos and movie channels
- Traffic and parking fines
- Expenses as a result of staff member's failure to cancel transportation or hotel arrangements
- Valet or laundry services
- Liquor and bar bills
- Loss of money or personal effects
- Additional days beyond the business purpose of the trip (excluding excursion flights requiring a Saturday overnight stay), (see Appendix B, Section 4.1)
- Flight cancellation insurance (see Appendix B, Section 4.1)

11. REIMBURSEMENT OF TRAVEL EXPENSES

Travel reimbursement claims for local mileage and parking must be made using the Travel Expense Claim form available on the Region's internal website. Cheque Requisition forms may not be used for these purposes. Travel expense reimbursement claims for out of region travel must be made on a Travel/Education Expense Claim (form #10035 R 03/12) and be substantiated by receipts except as provided in Schedule A. Travel reimbursement claims must be submitted promptly.

12. CLASS OF SERVICE

- **ECONOMY AIR TRAVEL:** Staff are expected to travel for the lowest economy class or at excursion rates. Exceptions may be allowed in the case of a disability, medical condition of emergencies, subject to the approval of the appropriate Vice President, Executive Medical Director, Executive Director or Medical Director.
- In order to optimize fulfillment of business responsibilities, a member of the Region's Executive (CEO, Executive Vice-President, and Senior Vice-President) who is required to travel on Regional business on flights more than three (3) hours in duration may travel in business class.
- **HOTEL ACCOMODATION:** Reimbursement will be based on the lowest available room rate.
- **VEHICLE RENTAL:** Reimbursement will be based on the lowest available rate for qualifying vehicle as defined in Appendix B section 4.2.2.

Applicability

This policy pertains to all travel and related expenses paid from all Region administered funds. This policy also applies to grants and contracts, unless the granting agency specifies otherwise. The policy applies to all Region staff including employees, medical staff and other persons traveling on behalf of the Region.

Definitions

ACCOUNTING OFFICER means a person designated by the Region as having responsibility for verifying that proposed financial commitments, expenditures and disbursements have been approved by the appropriate Expenditure Officer in

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accordance with defined limits and budgetary components. The Accounting Officer is responsible for ensuring that contractual terms are met, that funds are available within the budget of the Expenditure Officer and that these funds are expended for the purpose intended. Accounting Officers must be independent of Expenditure Officers with respect to any proposed financial commitment or transaction.

CALGARY HEALTH REGION STAFF MEMBER means a person employed by the Region, or who has been appointed by the Region to a specific position or to perform a particular function whereby the Region has agreed to cover the costs of approved travel. For purposes of the policy, staff includes: employees, medical staff, and persons approved to travel at the expense of the Region.

CALGARY HEALTH REGION CORPORATE TRAVEL ASSISTANT means an individual designated to act as the primary liaison with the Travel Coordinators and the Designated Travel Agency, with regard to the management of travel requests for the Region.

DESIGNATED TRAVEL AGENCY means the travel agency selected and designated by the Region to be the provider of travel services for Region staff and other persons acting on behalf of the Region for after hours emergency booking requests (see Appendix B).

DEPARTMENT TRAVEL COORDINATOR means a person, registered with the Corporate Travel Assistant, designated by the Expenditure Officer of a functional centre to organize travel arrangements and make reservations with the Corporate Travel Assistant. The Travel Coordinators will receive appropriate information from the designated Corporate Travel Assistant. The Travel Coordinators will work with the Corporate Travel Assistant in the overall management of the travel program.

EXPENDITURE OFFICER means a person designated by the Region as having the authority to make financial decisions within defined limits and budgetary components. (See Regional policy on Delegation of Authority and Establishment of Limits for Financial Commitments, Expenditures and Disbursements.)

MEDICAL STAFF means physicians who hold appointments on the Region medical staff in accordance with the Region Medical Staff Bylaws.

Process

The processes to be followed are contained in Appendix B, "Travel Procedures and Requirements."

Cross References to Calgary Health Region Policies

[Delegation of Authority and Establishment of Limits for Financial Commitments](#)

[Delegation of Authority for Financial Commitments, Expenditures & Disbursements](#)

Additional References

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Appendix A - Approval Criteria for Discretionary Out of Province Travel

Appendix B - Travel Procedures and Requirements

CHR Bylaw - Conflict of Interest

Cheque Requisition (form #00074 R 99/06)

Schedule A - Travel Reimbursement Limits

Schedule B - Approved Rates Reimbursement for Use of Personal Automobile

Schedule C - Region Distance Matrix

Schedule D - Care Centre and Health Communities Distance Matrix

Schedule E - Rural Areas Distance Matrix

Travel Expense Claim (form #00035 R 99/02)

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Schedule A

Travel Reimbursement Limits (in Canadian dollars)

	With Original Receipts	Without Original Receipts
Private Accommodations	\$20.00/night	\$20.00/night
Meals – Domestic Travel	\$40.00/day	\$25.00/day
Meals – U.S. & Foreign Travel	\$75.00/day	\$50.00/day
Travel Advances	- Minimum of \$ 250.00 - Maximum of 80 percent of estimated expenses	

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile

1. Non-Union and Exempt Staff	\$0.38/km
2. UNA – Nursing	\$0.38/km
3. HSAA – Professional/Technical Facility	\$0.35/km
Professional/Technical Community	\$0.38/km
Professional/Technical Mental Health	\$0.35/km
4. AUPE – General Support Services	\$0.35/km
5. AUPE – Auxiliary Nursing Facility	\$0.35/km
Auxiliary Nursing Urban Community	\$0.35/km
Auxiliary Nursing Rural Community	\$0.405/km
Auxiliary Nursing Mental Health	\$0.35/km

Submit local travel expense claims for mileage and parking on Local Travel Expense Claim (form #00073 R 99/02) or complete the form on-line:
<http://www.calgaryhealthregion.ca/expense/expense.htm>.

View Distance Matrix (in Kilometers) (Schedule C) in PDF format on-line:
http://iweb.calgaryhealthregion.ca:90/policydb/ShowPolicy?policy_id=1428

View Care Centre & Health Communities Distance Matrix (Schedule D) in PDF format:
http://iweb.calgaryhealthregion.ca:90/policydb/ShowPolicy?policy_id=1428

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Distance Matrix - Kilometers
(blank cells refer to distances < 0.5km)
(Effective Nov. 15 2004)

From	To	7AV	8&8	ACH	BCC	CAC	CBH	CBH2	CCC	CHC	CHS	COP	CSC	CTR	CWH	FAN	FMC	GBN	MHB	MPO	MRC	P96	PLC	PTS	REN	REP	RGH	SAH	SHC	SPT	UOC	XBO	YYC				
7AV	7AV																																				
8&8	7AV																																				
ACH	7AV																																				
BCC	7AV																																				
CAC	7AV																																				
CBH	7AV																																				
CBH2	7AV																																				
CCC	7AV																																				
CHC	7AV																																				
CHS	7AV																																				
COP	7AV																																				
CSC	7AV																																				
CTR	7AV																																				
CWH	7AV																																				
FAN	7AV																																				
FMC	7AV																																				
GBN	7AV																																				
MHB	7AV																																				
MPO	7AV																																				
MRC	7AV																																				
P96	7AV																																				
PLC	7AV																																				
PTS	7AV																																				
REN	7AV																																				
REP	7AV																																				
RGH	7AV																																				
SAH	7AV																																				
SHC	7AV																																				
SPT	7AV																																				
UOC	7AV																																				
XBO	7AV																																				
YYC	7AV																																				

Note:
Differences in to and from distances between any two sites is the result of (but not limited to) rounding to nearest whole number and the effect of routes following one-way streets.

7AV	7th Avenue Administration Centre
8&8	Southern Alberta Clinic
ACH	Alberta Children's Hospital
BCC	Bethany Care Centre
CAC	Airdrie Mental Health Clinic
CBH	Colonel Belcher Hospital
CBH2	Colonel Belcher Hospital (New)
CCC	Cochrane Mental Health Clinic
CHC	South Calgary Health Centre
CHS	Community Care & Support - Courtyard Building
COP	Canada Olympic Park
CSC	Strathmore Valley General Hospital
CTR	Centre 15
CWH	Central Warehouse
FAN	Carewest Dr. Vernon Fanning Centre
FMC	Footfalls Medical Centre
GBN	Carewest George Boyack Nursing Home
MHB	Mental Health Board
MPO	Macleod Place One
MRC	Mount Royal College (Main Entrance off of Richard Road)
P96	Place 9-6
PLC	Peter Lougheed Centre
PTS	CHPTS Ambulance Service - Patient Transportation Site
REN	Midnapore Park - Rental
REP	Reprographics
RGH	Rockyview General Hospital
SAH	Carewest Saerce
SHC	Shaw Court
SPT	Southport
UOC	University of Calgary (Main Entrance off of Univ. Drive)
XBO	Carewest Cross Bow
YYC	Calgary International Airport

APPLICANT COPY

Distance Measurement
(blank cells refer to distances < 0.5 km)
(Effective October 2003)

From	To	7AV	8&8	ACH	BCC	CAC	CBH	CBH2	CCC	CHS	COP	CSC	CTR	CWH	FAN	FMC	GBN	MHB	MPO	MRC	P96	PLC	PTS	REN	REP	RGH	SAH	SAH	SHC	SPT	UOC	XBO	YYC		
7AV	8&8																																		
8&8	7AV																																		
ACH	7AV																																		
BCC	7AV																																		
CAC	7AV																																		
CBH	7AV																																		
CBH2	7AV																																		
CCC	7AV																																		
CHS	7AV																																		
COP	7AV																																		
CSC	7AV																																		
CTR	7AV																																		
CWH	7AV																																		
FAN	7AV																																		
FMC	7AV																																		
GBN	7AV																																		
MHB	7AV																																		
MPO	7AV																																		
MRC	7AV																																		
P96	7AV																																		
PLC	7AV																																		
PTS	7AV																																		
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REP	7AV																																		
RGH	7AV																																		
SAH	7AV																																		
SHC	7AV																																		
SPT	7AV																																		
UOC	7AV																																		
XBO	7AV																																		
YYC	7AV																																		

Note:
Differences in to and from distances between any two sites is the result of (but not limited to) rounding to nearest whole number and the effect of routes following one-way streets.

7AV	7th Avenue Administration Centre
8&8	Southern Alberta Clinic
AACH	Alberta Children's Hospital
BCC	Bethany Care Centre
CAC	Airdrie Mental Health Clinic
CBH	Colonel Beicher Hospital
CBH2	Colonel Beicher Hospital (New)
CCC	Cochrane Mental Health Clinic
CHS	Community Care & Support - Courtyard Building
CSC	Strathmore Valley General Hospital
COP	Canada Olympic Park
CSC	Strathmore Valley General Hospital
CTR	Centre 15
CWH	Central Warehouse
FAN	Carewest Dr. Vernon Farming Centre
FMC	Foothills Medical Centre
GBN	Carewest George Boyack Nursing Home
MHB	Mental Health Board
MPO	Macleod Place One
MRC	Mount Royal College (Main Entrance off of Richard Road)
P96	Place 9-6
PLC	Peter Lougheed Centre
PTS	CHPTS Ambulance Service - Patient Transportation Site
REN	Midnapore Park - Renal (South - CHC)
REP	Reprographics
RGH	Rockyview General Hospital
SAH	Carewest Sarcee
SHC	Shaw Court
SPT	Southport
UOC	University of Calgary (Main Entrance off of Univ. Drive)
XBO	Carewest Cross Bow
YYC	Calgary International Airport

The distances for Carstairs, Cremona, Didsbury, High River, Water Valley and the Holiday Inn are forthcoming.

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APPENDIX "A"

Approval Criteria for Discretionary Out-Of-Province Travel

Eligibility: All Calgary Health Region staff members are eligible for financial support for professional development including travel and registration fees. Physicians employed by the Region or acting on behalf of the Region may be eligible.

Priority: Participation by the staff member is deemed to be a priority. There is no other appropriate means of obtaining the required information or educational benefit.

Economic Justification: The benefit for the individual and the Region is economically justified.

Fairness: The process for the selection and approval of an individual for travel related to professional development is fair and transparent.

Funding of Staff Serving as Speakers and Presenters: Staff requested to present at conferences are encouraged to have costs supported by the conference organizers.

Externally Funded Travel: Region staff members may be funded by external organizations only under limited circumstances. Funding of travel and professional development of Region staff by current or prospective vendors, contractors, suppliers or providers is not permitted.

Funding from Research Grants: The cost of staff travel in connection with an approved research initiative will be funded or reimbursed through the research grant.

Limits on Reimbursement: Reimbursement shall be limited to actual expenditures and to reasonable out-of-pocket expenses.

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APPENDIX "B"

Travel Procedures and Requirements

1. Travel Inquiries or Reservations:

During regular business hours of Monday through Friday from 08:00 and 16:30 hours, the Department Travel Coordinator can make travel inquiries or reservations by calling the Corporate Travel Assistant at 403-955-9888 or via e-mail at travel.chr@albertahealthservices.ca.

Emergency reservations required outside regular business hours are to be made through the Designated Travel Agency of:

UNIGLOBE Beacon Travel Ltd.

From within North America call toll free at 1-800-787-1048

From outside North America call collect at 416-928-5404

Quote SOS code (our corporate identifier) which is S 62XC

Staff members who are required to travel on Region business funded and approved by the Region are required to complete a Travel/Education Expense Claim (form #10035 R 03/12) in consultation with their department/portfolio Travel Coordinator. Approval is required by the appropriate Expenditure Officer prior to Travel Coordinator contacting the Corporate Travel Assistant.

The department Travel Coordinator will schedule the staff member's business travel arrangements with the Corporate Travel Assistant and complete the estimated expense and advance requirement sections of the form. Upon receipt of the flight booking confirmation from the Corporate Travel Assistant, the Department Travel Coordinator will forward the pink copy of the completed approved travel form to Accounts Payable through interoffice mail.

Concerns relating to service received from Corporate Travel Assistant or the Designated Travel Agency should be reported to the Business Administrator, Support Services.

2. Travel Advances: If required, a travel advance may be requested using the pink copy of the Travel/Education Expense Claim form and approved by the appropriate Expenditure Authority (see Schedule A, "Travel Reimbursement Limits").

Requests for advances must be received in Accounts Payable a minimum three weeks prior to departure date. Advances will only be released within two weeks of departure and will be directly deposited to the staff member's payroll designated bank account. Notification of deposit will be made to your e-mail address or home address if a valid e-mail address does not exist.

Upon return, the staff member must complete the right side of the travel form and submit the "white copy" of the form with original receipts to Accounts Payable. If the advance issued exceeds the final expenses incurred, the staff member must submit with the form a cheque for the outstanding amount.

3. Hotel Accommodations: All hotel and conference accommodations will be booked through the Corporate Travel Assistant who will secure the most suitable accommodation for the required destination at the best possible rate (i.e. government rate, or Calgary Health Region negotiated rate). All reservations will be guaranteed for late arrival.

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Staff members will need to secure the reservation by use of a personal credit card and obtain reimbursement for expenses upon return.

Upon checking into the hotel, the staff member should check to ensure they are receiving the lowest available rate. Sometimes hotels will offer special rates that may be lower than the government or corporate rates; however, these special rates are not readily advertised.

Cancellation of hotel reservations is the responsibility of the staff member/traveler and must be made in advance directly with the Corporate Travel Assistant to avoid any “no show” charges. The Region will not reimburse the cost of failing to cancel a hotel reservation.

Reimbursement will be based on a standard room rate per traveler.

If the traveler extends the trip beyond the number of days required to complete the business purpose of the trip (excluding excursion flights requiring a Saturday overnight stay), those days are considered personal and will be charged to the traveler at the full rate of the room plus tax. If the traveler has family members along on the trip, the difference between single and multiple accommodations will be charged to the traveler including the proportionate tax.

See Schedule A, “Travel Reimbursement Limits”, for maximum reimbursement rates for private accommodations.

4. Transportation

Air Travel: All air travel on Region related business must be booked through the Corporate Travel Assistant, or if after normal business hours in the case of emergencies through the Designated Travel Agency.

All flights related to Region business will be billed directly to the Region via an airline billing account.

Any frequent flyer points (e.g., air miles) awarded to the traveler during business travel may be retained by the traveler. However, staff members shall not arrange or alter travel arrangements to accumulate benefits from frequent flyer programs. In addition, staff members must not book flights using their personal credit card so as to obtain additional points. The booking of air travel with points in order to obtain cash reimbursement from the Region is prohibited.

For destinations other than Edmonton or Lethbridge, the Corporate Travel Assistant will be allowed a two-hour time window on either side of the requested departure time to obtain the lowest available fare. In the event the staff member/traveler refuses this arrangement, the Corporate Travel Assistant will document the exact reason for refusal.

Staff members must use the lowest economy class or excursion fares unless otherwise authorized due to circumstances (i.e. medical certificate, disability, emergency, etc. or if flight is longer than three (3) hours for a member of Executive), and approved by a Vice President or Executive Director. Where possible, staff members should plan their travel in advance to take advantage of advance purchase excursion fares and seat sales.

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The Region uses only electronic ticketing to avoid the additional cost and need to have tickets sent via additional charges for this service. Pre-paid tickets to be picked up at the airport are not permitted as there are additional charges for this service.

Flight cancellation insurance shall not be included in the ticket purchase as the insurance only covers cancellation under limited circumstances. The premiums paid annually for cancellation insurance typically exceed the cost of cancelled tickets.

Region staff members are responsible for ensuring that any unused refundable tickets are returned to their Travel Coordinator. Unused tickets or any portion thereof must be returned to the Corporate Travel Assistant as soon as possible for proper credit and processing. Non-refundable tickets may be used as a credit for up to one year but must be used by the same staff member. Travel Coordinators should consult with the Corporate Travel Assistant regarding the use of unused non-refundable tickets.

Changes or cancellation of non-refundable tickets shall be avoided where possible. Financial penalties that apply to changes or cancellations will be reimbursed by the Region.

Staff members who have arranged fares with the Corporate Travel Assistant at less than economy rates (e.g. excursion fares, which necessitate staying over a Saturday night) may claim the additional accommodation and incidental costs such as meals and ground transportation, provided that the overall cost savings obtained are comparable to flying at economy rates on the preferred dates.

Additional airfare and other expenses incurred while on stopovers for personal reasons will be covered by the Region provided that the total cost of travel does not exceed the cost of a direct route at an economy rate.

Automobile Travel Outside of the Calgary Region

Private automobiles: Use of private automobiles for travel outside the Calgary region is only authorized if air fare or rail travel is not available or convenient, or if more than one person is traveling to the same destination in the same automobile.

When use of a private automobile is authorized, reimbursement is claimed at the lesser of airfare or mileage and may be claimed by only one individual of that group.

Out of city mileage rates are based on the current Region approved rates or staff member's collective agreement (see Schedule B, "Calgary Health Region Approved Rates Reimbursement for Use of Personal Automobile").

Names of individuals in the car must be included in the expense report.

Vehicle Rentals: All vehicle rentals **will be booked through the Corporate Travel Assistant.**

A vehicle should only be rented when it is the most reasonable or economical means of travel and has been authorized in advance by the Expenditure Officer.

Vehicle rentals must be of non-luxury, passenger-type or light commercial vehicles (i.e. cars, light trucks or 8 passenger or less vans).

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When traveling in groups, sharing of vehicles will be practiced to minimize costs.

When possible, refuel the rental car prior to returning to the car rental agency. Gasoline costs are considerably higher when purchased from a rental company.

The claimant's original automobile agreement and gas receipts must be attached to the expense form.

Local Automobile Travel: Reimbursement of local travel (mileage) will be based on the current Region approved rates or staff member's collective agreement in place during the time of travel (see Schedule B, "Calgary Health Region Approved Rates Reimbursement for Use of Personal Automobile").

Mileage calculations between Region designated sites will be based on the accepted Region Distance in Kilometers chart (Schedule C). Mileage accrual commences from the first Calgary Health Region site visited in a day and is then counted for all travel between sites after that point. Travel between home and the first location, and the last location and home, are not included (except trips required to and from the Airport).

The Expenditure Officer approving the reimbursement is responsible for verifying mileage and rates claimed prior to sending the expense claim to Accounts Payable for reimbursement.

Departments are encouraged to use the approved taxi vouchers available through Relizon. If a travel voucher is not used then travel by taxi requires a receipt and approval by the appropriate Expenditure Officer.

Other Transportation

Taxi, Bus or Coach transit may be used where this represents an economical means of transportation. Original receipts must be retained for reimbursement purposes. In cases where taxi receipts are not available (i.e. remote locations, foreign countries), an explanation should accompany the travel claim explaining the absence of receipts.

Airport Shuttle Bus or Limousine service to and from airports should be used where available. Original receipts must be retained for reimbursement purposes.

5. Insurance Required While Traveling on Calgary Health Region Business

Accident, Health and Life Insurance

Group Life and AD&D Insurance: Eligible staff members are covered under basic group life and accidental death and dismemberment (AD&D) insurance plans and, if previously elected, optional life and AD&D.

Calgary Health Region Travel Accident Insurance Policy: The Region has purchased a travel accident insurance policy which provides accidental death and dismemberment (AD&D) benefits for all Region staff members, Board members and physicians while traveling on Region business. Coverage details may be obtained from Legal Services and Insurance Services.

Out-of-Province Coverage: Staff members are responsible for reading and understanding the coverage and restrictions contained in their out-of-province health coverage, and to ensure that they are adequately covered. Some common travel restrictions are non-emergency medical service, travel

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contrary to medical advice, pre-existing medical conditions, travel to certain specified countries/zones.

Workers' Compensation: Region staff members may be eligible for Workers' compensation medical, disability or death benefits in case of an accident in the course of business away from their normal place of work. Region Occupational Health and Safety will respond to inquiries regarding coverage.

Other Life Insurance: Air Flight and Common Carrier Accident Insurance is included on each ticket issued through the Corporate Travel Assistant or Designated Travel Agency through the corporate credit card used for the purchase. Any other life insurance purchased is the responsibility of the staff member.

Automobile Insurance:

Privately Owned Vehicles: Vehicle owners are advised to check in advance with their own insurance agent to ensure appropriate coverage for use of private vehicles on Region business. If you are involved in an accident in a privately owned vehicle, the cost involved for the repair or any claims are the responsibility of the vehicle owner.

Rented Vehicles: The cost of insuring rented vehicles while on Region business is a reimbursable expense. Staff members must ensure that rented automobiles are properly insured. There are two types of insurance pertaining to rented vehicles:

Liability insurance Within Canada

Liability insurance covers damage to the property of others and injuries to individuals. The majority of car rental agencies in Canada will carry one million dollars in third party liability coverage. In the event that a Region staff member is involved in an accident while driving a rented vehicle, the auto insurance policy of the car rental agency will provide first coverage. In the majority of cases, this will be sufficient coverage. In the event the claim exceeds the level of coverage carried by the car rental agency, the Region has non-owned automobile liability coverage that will provide coverage and pay any excess amount owing up to the non-owned automobile liability limit (\$10 Million). If a rented vehicle is not being used for Region business at the time of the accident, the Region non-owned automobile coverage will not respond. Staff members must ensure they have adequate coverage if the vehicle is used for purposes other than business.

Outside Canada

Rental companies outside Canada may carry less liability coverage or none at all. When renting cars outside of Canada, inquire about the extent of liability insurance coverage provided with the rental vehicle. It may be necessary to purchase additional liability insurance at the time of rental. The minimum level of coverage to be carried on rentals outside Canada is one million dollars.

Collision and Theft Insurance

Car rental companies do not cover collision damage or theft of the vehicle unless the renter has purchased a collision damage waiver or loss damage waiver from the rental company at the time of the rental. The Region's insurance policy provides for up to \$50,000 coverage for collision and theft of rental vehicles

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driven by Region staff members while on Region business. To access coverage, the vehicle rental must be in the name of the Region with the respective staff member(s) listed as drivers. The purchase of the collision damage waiver provided by the rental company will not be required unless the vehicle is to be used for any recreational purposes or the vehicle is valued at more than \$35,000.

In the event of an accident involving a rented vehicle, the staff member must report the incident within 24 hours to the car rental agency and, upon returning, to the Region Legal Services Coordinator. The staff member will be required to submit all documentation including police reports, rental agency contracts and any corresponding bills to Legal Services.

Staff members may find that their personal automobile policy will extend to rented vehicles or that they have additional coverage available under their personal credit card to cover their personal travel. Staff members should consult with their insurance company or credit card provider to determine the coverage available.

Region staff members who are required to rent vehicles outside North America or who are required to rent for more than one month must first advise Legal Services, as additional insurance coverage may be required.

- 6. Meals:** See Schedule A, "Travel Reimbursement Limits", for maximum amount reimbursement for meals.
- 7. Miscellaneous Travel Expenses:**

Telephone calls: Business calls are a reimbursable expense. Personal long distance calls may be reimbursed giving consideration to the length of travel, family situation, etc.

Parking: Hotel, airport, and public parking expenses are reimbursable. Original receipts must be attached to the expense claim form.

Conference Registration: Conference Registration will be paid by the Region provided the conference is for the professional development of the staff member and registration has been approved in advance by the appropriate Region Expenditure Officer. The staff member's registration form must be submitted to the Conference Registrar advising them that the cheque will be sent prior to the conference start date. A Cheque Requisition (form #00074 R 99/06) must be submitted to Accounts Payable with the original copy of the registration form. Accounts Payable will send the cheque directly to the Conference Registrar.

In the event a staff member pays for their conference registration directly, an original receipt, credit card statement or cancelled cheque must be submitted with the Travel/Education Expense Claim form for reimbursement. These are only reimbursed after the event is held and subject to appropriate approvals.

U.S. Exchange: Exchange rate is allowed on receipts in U.S. funds, calculated on the day the expense report is processed in Accounts Payable unless proof of rate is provided (i.e. credit card statement).

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8. Methods of Payment/Reimbursement:

Out of Region Travel: Upon completion of out of region travel, the staff member should complete the right column of the Travel/Education Expense Claim (form #00035 R 99/02) retained by their department Travel Coordinator. When submitting expenses for reimbursement, the staff member must include all applicable receipts as specified under each section of this policy. Expenses should normally be submitted within 30 days of returning from the travel destination.

Local Travel: Submit local travel expense claim for mileage and parking on Local Travel Expense Claim (form #00073 R 99/02) or access the claim form on the internal web at <http://www.calgaryhealthregion.ca/expense/expense.htm>. Claim forms should be submitted no later than 30 days from the date of the last trip and submitted once each quarter.

The applicable expense form must be approved by the appropriate Expenditure Officer prior to submitting to Accounts Payable for reimbursement.

9. Inquiries and Questions:

Inquiries and questions should be directed to the following:

Travel Service Issues	Support Services - Corporate Travel Assistant - 403-955-9888
Payment/Reimbursement	Finance - Help Desk - 403-943-0880
Employee Health Coverage	People & Learning - Benefits Centre - 403-699-0732
Travel Accident Insurance and Insurance/Liability/Claims	Legal Services - 403-943-0906

10. Schedules:

All Schedules are found on the Region Policy Database at:

http://iweb.calgaryhealthregion.ca:90/policydb/ShowPolicy?policy_id=1428

Schedule A – Travel Reimbursement Limits

Schedule B – Approved Rates Reimbursement for Use of Personal Automobile

Schedule C – Distance Matrix - Calgary Health Region

Schedule D – Distance Matrix – Care Centres & Community Health Centres

Schedule E – Distance Matrix – Rural Areas

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Schedule A

Travel Reimbursement Limits (in Canadian dollars)

	With Original Receipts	Without Original Receipts
Private Accommodations	\$20.00/night	\$20.00/night
Meals – Domestic Travel	\$40.00/day	\$25.00/day
Meals – U.S. & Foreign Travel	\$75.00/day	\$50.00/day
Travel Advances	- Minimum of \$ 250.00 - Maximum of 80 percent of estimated expenses	

	Airdrie	Banff	Black Diamond	Blackie	Bragg Creek	Calgary - ACH	Calgary - ACH2	Calgary Airport	Calgary - FMC	Calgary - PLC	Calgary - RGH	Calgary - SPT	Canmore	Carmangay	Carstairs	Cayley	Champion	Claresholm	Cochrane	Didsbury	High River	Longview	Nanton	Okotoks	Stavely	Strathmore	Turner Valley	Vulcan
Airdrie		143	103	110	74	41	38	22	36	31	44	54	119	189	32	107	176	158	47	51	92	120	118	84	142	72	105	154
Banff	143		170	207	115	125	121	142	122	134	131	136	25	287	168	204	274	256	102	183	189	185	215	181	239	178	166	251
Black Diamond	103	170		60	55	76	86	88	83	78	71	53	146	140	132	57	127	109	85	152	38	18	68	20	92	110	3	104
Blackie	110	207	60		103	83	94	97	86	87	72	67	184	79	139	44	66	85	124	158	22	48	45	42	68	85	67	49
Bragg Creek	74	115	55	103		41	46	70	45	55	39	44	92	220	99	135	207	149	31	109	82	69	109	64	159	100	51	144
Calgary - ACH	41	125	76	83	41		11	23	4	14	8	12	102	163	66	80	150	132	33	83	65	94	92	48	116	59	61	127
Calgary - ACH2	38	121	86	94	46	11		19	8	15	18	22	98	174	65	91	159	141	28	85	75	102	101	57	124	60	88	136
Calgary - Airport	22	142	88	97	70	23	19		19	9	26	27	118	173	52	105	160	144	46	64	77	95	104	69	129	58	83	139
Calgary - FMC	36	122	83	86	45	4	8	19		13	11	15	99	166	66	83	153	139	33	83	72	97	99	54	118	58	82	133
Calgary - PLC	31	134	78	87	55	14	15	9	13		20	19	111	159	59	84	146	134	43	78	67	98	94	50	119	48	83	123
Calgary - RGH	44	131	71	77	39	8	18	26	11	20		5	108	157	72	74	144	127	40	92	60	88	87	42	109	60	54	122
Calgary - SPT	54	136	53	67	44	12	22	27	15	19	5		113	147	74	64	134	116	45	92	53	78	75	31	100	61	54	112
Canmore	119	25	146	184	92	102	98	118	99	111	108	113		264	145	181	251	233	79	160	166	161	192	158	216	155	143	228
Carmangay	189	287	140	79	220	163	174	173	166	159	157	147	264		218	100	13	47	42	239	102	132	87	122	63	137	142	37
Carstairs	32	168	132	139	99	66	65	52	66	59	72	74	145	218		136	132	188	65	17	121	150	148	104	171	106	135	183
Cayley	107	204	57	44	135	80	91	105	83	84	74	64	181	100	136		92	54	120	156	16	41	14	39	32	115	61	55
Champion	176	274	127	66	207	150	159	160	153	146	144	134	251	13	132	92		56	190	226	89	138	65	109	64	124	136	24
Claresholm	158	256	109	85	149	132	141	144	139	134	127	116	233	47	188	54	56		172	208	71	96	41	90	17	166	112	79
Cochrane	47	102	85	124	31	33	28	46	33	43	40	45	79	42	65	120	190	172		82	105	101	132	97	156	87	83	168
Didsbury	51	183	152	158	109	83	85	64	83	78	92	92	160	239	17	156	226	208	82		141	169	167	133	191	116	155	203
High River	92	189	38	22	82	65	75	77	72	67	60	53	166	102	121	16	89	71	105	141		36	30	23	54	99	41	66
Longview	120	185	18	48	69	94	102	95	97	98	88	78	161	132	150	41	138	96	101	169	36		55	39	79	129	18	101
Nanton	118	215	68	45	109	92	101	104	99	94	87	75	192	87	148	14	65	41	132	167	30	55		49	24	126	71	42
Okotoks	84	181	20	42	64	48	57	69	54	50	42	31	158	122	104	39	109	90	97	133	23	39	49		74	82	24	86
Stavely	142	239	92	68	159	116	124	129	118	119	109	100	216	63	171	32	64	17	156	191	54	79	24	74		129	85	66
Strathmore	72	128	110	85	100	59	60	58	58	48	60	61	155	137	106	115	124	166	87	116	99	129	126	82	129		114	102
Turner Valley	105	166	3	67	51	61	88	83	82	83	54	54	143	142	135	61	136	112	83	155	41	18	71	24	85	114		106
Vulcan	154	251	104	49	144	127	136	139	133	123	122	112	228	37	183	55	24	79	168	203	66	101	42	86	66	102	106	

Note: This table was derived from the former Headwaters Health Authority Distance Chart. Other distances were calculated using Schedule C: Distance Matrix (Urban) or Telus Maps and Directions.

ACH = Alberta Children's Hospital (Richmond Road); ACH2 = Alberta Children's Hospital (Shaganappi Trail); FMC = Foothills Medical Centre; PLC = Peter Lougheed Centre; RGH = Rockyview General Hospital; SPT = Southport

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective May 1, 2006)

1. Non-Union and Exempt Staff	\$0.405/km	
2. UNA – Nursing	\$0.38/km	
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	
Not Required by Employer to provide vehicle	\$0.38/km	
4. AUPE – General Support Services	\$0.35/km	
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(New – May 1/06)</i>
Auxiliary Nursing Not Required by Employer to provide vehicle	\$0.38/km	

[Previous Reimbursement Rates](#)

UNA, HSAA, and AUPE AUXILIARY staff who the Employer has determined require their vehicle (as per the applicable Collective Agreement) shall submit local travel expense claims for mileage on the respective UNA, HSAA, or AUPE AUXILIARY Mileage Form:

http://iweb.crha-health.ab.ca/supp/hr/Pages/forms/1_New_UNA_Expense.doc

http://iweb.crha-health.ab.ca/supp/hr/Pages/forms/HSAA_Automobile_Mileage_Claim.doc

http://iweb.crha-health.ab.ca/supp/hr/Pages/forms/aupe_aux_claim_form.doc

Original receipts for parking are claimed through petty cash.

Other staff (including UNA, HSAA, and AUPE AUXILIARY staff who are not required by the Employer to use their vehicle) shall submit local travel expense claims for mileage and parking on the Local Travel Expense Claim (form #00073 R 99/02) or complete the form on-line:

<http://www.calgaryhealthregion.ca/expense/expense.htm>

View Distance Matrix (in Kilometers) (Schedule C) in PDF format:

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View People and Learning Transportation Guidelines:

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If you have any questions regarding this policy, please contact Scott Zimmer, Policy Analyst (scott.zimmer@calgaryhealthregion.ca; 943-0963) or your Human Resources Consultant.

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective August 17, 2006)

1. Non-Union and Exempt Staff	\$0.405/km	
2. UNA – Nursing	\$0.38/km	
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	
Not Required by Employer to provide vehicle	\$0.38/km	
4. AUPE – General Support Services	\$0.38/km	<i>(New – Apr. 13/06)</i>
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(New – May 1/06)</i>
Auxiliary Nursing Not Required by Employer to provide vehicle	\$0.38/km	

[Previous Reimbursement Rates](#)

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Other staff (including UNA, HSAA, and AUPE AUXILIARY staff who are not required by the Employer to use their vehicle) shall submit local travel expense claims for mileage and parking on the Local Travel Expense Claim (form #00073 R 99/02) or complete the form on-line:

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective January 01, 2007)

1. Non-Union and Exempt Staff	\$0.43/km	<i>(New- Jan. 01/07)</i>
2. UNA – Nursing	\$0.44/km	<i>(New- July 12/07)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(New- Oct. 01/05)</i>
Not Required by Employer to provide vehicle	\$0.38/km	<i>(New- Oct. 01/05)</i>
4. AUPE – General Support Services	\$0.38/km	<i>(New – Apr. 13/06)</i>
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(New – May 1/06)</i>
Auxiliary Nursing Not Required by Employer to provide vehicle	\$0.38/km	<i>(New – May 1/06)</i>

[Previous Reimbursement Rates](#)

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If you have any questions regarding this policy, please contact Chris Stanley, Policy Analyst (christopher.stanley@calgaryhealthregion.ca; 943-0963) or your Human Resources Consultant.

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ABB	Name	Address
7AV	7th Avenue Administration Centre	1035 7 Av SW
8&8	Southern Alberta Clinic	906 8 Av SW
ACC	Airport Corporate Centre	2000 Airport Rd. NE
ACH	New Alberta Children's Hospital	2888 Shaganappi Trail NW
AFP	Southern Alberta Forensic Psychiatry Centre	11333 - 85 Street NW
AHC	Airdrie Mental Health Clinic	112 1st Ave NW
BCC	Bethany Care Centre	916 18A St NW
CBH	Colonel Belcher Hospital	1945 Veteran's Way N.W.
CCC	Cochrane Mental Health Clinic	221 - 1st West Street
CHC	South Calgary Health Centre	31 Sunpark Plaza SE
CHS	Community Care & Support - Courtyard Building	320 17 Av SW
COP	Canada Olympic Park	88 Canada Olympic Rd SW
CSC	Strathmore Valley General Hospital	200 Brent Boulevard
CTR	Centre 15	1509 Centre St S
CWH	Former Central Warehouse	1115 - 55 Av NE
DID	Didsbury Hospital	1220 20 Street - Didsbury, AB
DSC	Diagnostic and Scientific Centre (Calgary lab service)	3535 Research Road NW
ELC	East Lake Centre (Central Warehouse)	3961 - 106 Ave SE
FAN	Carewest Dr. Vernon Fanning Centre	722 16 Av NE
FMC	Foothills Medical Centre	1403 29 St NW
GBN	Carewest George Boyack Nursing Home	1203 Centre Avenue N.E
GCC	Glenmore Commerce Court	2880 Glenmore Trail SE
H12	Health on 12th	1213 4 St SW
MHB	Mental Health Board (Dorchester Square)	1333 - 8th street sw
MHF	Former - Mental Health Board	301-14 St. NW
MPO	Macleod Place One	5920 Macleod Trail SE
MRC	Mount Royal College (Main Entrance off of Richard Road)	4825 Richard Rd SW
NWII	Northwest II	4520 16th Ave NW
P96	Place 9-6	940 6 Av SW
PLC	Peter Lougheed Centre	3500 26 Av NE
PTS	CHPTS Ambulance Service - Patient Transportation Site	2611 Hopewell Place NE
REN	Midnapore Park - Renal	240 Midpark Way SE
REP	Reprographics	#10, 2175 29 St. NE
RGH	Rockyview General Hospital	7007 14 St SW
RRD	Richmond Road Centre(former ACH)	1820 Richmond Road SW
SAH	Carewest Sarcee	3504 29 St SW
SHC	Shaw Court	630 3 Av SW
SPT	Southport	10101 Southport Rd SW
UOC	University of Calgary (Main Entrance off of Univ. Drive)	2500 University Dr NW
XBO	Seniors Health Clinic (Carewest Administration Centre)	1011 Centre Avenue N.E

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective May 01, 2008)

1. Non-Union and Exempt Staff	\$0.43/km	<i>(Effective - Jan. 01/07)</i>
2. UNA – Nursing	\$0.46/km	<i>(Effective - May 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(Effective - Oct. 01/05)</i>
Not Required by Employer to provide vehicle	\$0.38/km	<i>(Effective- Oct. 01/05)</i>
4. AUPE – General Support Services	\$0.38/km	<i>(Effective - Apr. 13/06)</i>
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(Effective - May 1/06)</i>
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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective July 01, 2008)

1. Non-Union and Exempt Staff	\$0.43/km	<i>(Effective - Jan. 01/07)</i>
2. UNA – Nursing	\$0.505/km	<i>(Effective - July 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(Effective - Oct. 01/05)</i>
Not Required by Employer to provide vehicle	\$0.38/km	<i>(Effective- Oct. 01/05)</i>
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[Previous Reimbursement Rates](#)

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective August 21, 2008)

1. Non-Union and Exempt Staff	\$0.43/km	<i>(Effective - Jan. 01/07)</i>
2. UNA – Nursing	\$0.505/km	<i>(Effective - July 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(Effective - Oct. 01/05)</i>
Not Required by Employer to provide vehicle	\$0.38/km	<i>(Effective- Oct. 01/05)</i>
4. AUPE – General Support Services	\$0.38/km	<i>(Effective - Apr. 13/06)</i>
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.52/km	<i>(Effective – Aug. 21/08)</i>
Auxiliary Nursing Not Required by Employer to provide vehicle	\$0.46/km	<i>(Effective – Aug. 21/08)</i>

[Previous Reimbursement Rates](#)

UNA, HSAA, and AUPE AUXILIARY staff who the Employer has determined require their vehicle (as per the applicable Collective Agreement) shall submit local travel expense claims for mileage on the appropriate vehicle expense claim form:

<http://iweb.calgaryhealthregion.ca/supp/payroll/forms.htm>

Original parking receipts and mileage totaling \$100.00 or less can be claimed through petty cash.

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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective October, 22, 2008)

1. Non-Union and Exempt Staff	\$0.43/km	<i>(Effective - Jan. 01/07)</i>
2. UNA – Nursing	\$0.505/km	<i>(Effective - July 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.50/km	<i>(Effective - Oct. 01/05)</i>
Not Required by Employer to provide vehicle	\$0.38/km	<i>(Effective- Oct. 01/05)</i>
4. AUPE – General Support Services	\$0.505/km	<i>(Effective – Oct. 22/08)</i>
5. AUPE – Auxiliary Nursing Required by Employer to provide vehicle (as per Collective Agreement)	\$0.52/km	<i>(Effective – Aug. 21/08)</i>
Auxiliary Nursing Not Required by Employer to provide vehicle	\$0.46/km	<i>(Effective – Aug. 21/08)</i>

[Previous Reimbursement Rates](#)

UNA, HSAA, and AUPE AUXILIARY staff who the Employer has determined require their vehicle (as per the applicable Collective Agreement) shall submit local travel expense claims for mileage on the appropriate vehicle expense claim form:

<http://iweb.calgaryhealthregion.ca/supp/payroll/forms.htm>

Original parking receipts and mileage totaling \$100.00 or less can be claimed through petty cash.

Other staff (including UNA, HSAA, and AUPE AUXILIARY staff who are not required by the Employer to use their vehicle) shall submit local travel expense claims for mileage and parking on the Local Travel Expense Claim (form #00073 R 99/02) or complete the form on-line:

<http://www.calgaryhealthregion.ca/expense/expense.htm>

View Distance Matrix (in Kilometers) (Schedule C) in PDF format:

<http://www.calgaryhealthregion.ca/policy/docs/1428/ScheduleC.pdf>

View Care Centre & Health Communities Distance Matrix (Schedule D) in PDF format:

<http://www.calgaryhealthregion.ca/policy/docs/1428/ScheduleD.pdf>

View Rural Areas Distance Matrix (Schedule E) in PDF format:

<http://www.calgaryhealthregion.ca/policy/docs/1428/ScheduleE.pdf>

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Subject/Title: TRAVEL APPROVAL AND REIMBURSEMENT	POLICY NO. 1428	Page: 2
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View People and Learning Transportation Guidelines:

- UNA, HSAA, and AUPE AUXILIARY Transportation Guidelines:
http://iweb.crha-health.ab.ca/supp/hr/resources/forms_guides.htm
- Management/Exempt Travel Reimbursement Guidelines:
http://iweb.crha-health.ab.ca/supp/hr/resources/me_terms_conds.htm

If you have any questions regarding this policy, please contact Nick Kildare, Policy Analyst (Nicholas.Kildare@calgaryhealthregion.ca; 403-943-0962) or your Human Resources Consultant.

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Subject/Title: TRAVEL APPROVAL AND REIMBURSEMENT	POLICY NO. 1428	Page: 1
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Schedule B

Approved Rates Reimbursement for Use of Personal Automobile (Effective November 9, 2008)

1. Non-Union and Exempt Staff	\$0.43/km <i>(Effective - Jan. 01/07)</i>
2. UNA – Nursing	\$0.505/km <i>(Effective - July 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.52/km <i>(Effective - Nov. 09/08)</i>
Not Required by Employer to provide vehicle	\$0.505/km <i>(Effective - Nov. 09/08)</i>
4. AUPE – General Support Services	\$0.505/km <i>(Effective – Oct. 22/08)</i>
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Subject/Title: TRAVEL APPROVAL AND REIMBURSEMENT	POLICY NO. 1428	Page: 2
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Subject/Title: TRAVEL APPROVAL AND REIMBURSEMENT	POLICY NO. 1428	Page: 1
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Schedule B

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2. UNA – Nursing	\$0.505/km	<i>(Effective - July 01/08)</i>
3. HSAA – Required by Employer to provide vehicle (as per Collective Agreement)	\$0.52/km	<i>(Effective - Nov. 09/08)</i>
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Corporate
Administrative
Directive

Directive Name: *Employee Expense Claims
and Hosting Guidelines*

Number: 4.4.3

Date Approved: September 19, 2005

Approved By:

President Capital Health

Purpose

- To provide guidelines to Capital Health employees around reimbursement of personal expenses incurred while conducting Capital Health business.
- To outline the expectations and guidelines that must be followed when Capital Health employees host a hospitality function (See definition at the end of policy).

Scope

This directive applies to all Capital Health employees incurring expenses on behalf of Capital Health.

Policy

Employees are expected to exercise prudence and act in the best interest of Capital Health when incurring expenses. Only expenses required for Capital Health business up to the actual expense incurred will be reimbursed.

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Principles:

Employee Expense Claims

1. It is expected that expenses incurred by employees shall be restricted to situations where Capital Health cannot practically incur the expenses directly. Employee expense claims should not be used for minor equipment, software or other such purchases.
2. Miscellaneous items such as fines, penalties, property damage, money lost etc. caused by employees, are non-allowable expenses.
3. Employee expense claims for reimbursement must be reasonable in the circumstances. Person approving the expense claim is responsible for ensuring that the expenses are reasonable in the circumstances. Unreasonable expense claims shall be disallowed or reduced appropriately.
4. Employee expense claims shall be approved in accordance with Corporate Administrative Directive 4.4.1 - Delegation of Signing Authorities.
5. Employees authorized to approve expense claims shall not approve claims that may personally benefit them, claims of related employees or claims of subordinates that include their own expenses (i.e. meals). Another authorized person, at the next higher authority must approve such claims.
6. Submission of non-business personal claims for reimbursement and submission of the same expense for multiple reimbursement or claiming more than the amount incurred will result in disciplinary action.
7. Employee expense claim shall be approved only when:
 - supported by original receipts or a copy as certified by the approver;
 - meal expenses supported by restaurant receipts (not just credit card receipts) and information on either the names of the individuals or the organization whose representatives attended the lunch/dinner meeting;
 - there is evidence that goods or services have been received;
 - employee has not previously claimed and been paid for the same goods or services; and
 - there is evidence that procurements comply with Capital Health procurement and other related policies.
8. The approver shall initial the individual items within expense claims that are not supported by original invoices or do not have all the required supporting documents to indicate approval without support. Expense Claims approved by the President and CEO or her designate or other persons designated by the Executive Vice President and Chief Financial Officer will be considered approved in full and will not require approval at the individual item level. In addition unsupported expense claims over \$1,000 shall require the approval of the appropriate COO/VP or equivalent (Level 4 as per Corporate Admin Directive – Delegation of Signing Authorities). Expense claims over \$1,000 not supported by the required documents for individuals without a next higher level of signing authority, shall be approved by the Executive Vice President and Chief Financial Officer.
9. Individuals who knowingly approve incorrect claims will be subject to disciplinary action.
10. Payments to employees that are subsequently determined not to be in compliance with this policy will be recovered from the employee that was reimbursed.

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Hosting Guidelines:

1. Hospitality, extended on the behalf of Capital Health, shall be accomplished in the most economical and appropriate manner. Pre-approval from VP/COO or equivalent (Level 4) is required if circumstances warrant any deviation from this policy.
2. Hospitality may be extended when employees participate in departmental meetings to plan program-oriented work, advisory committee meetings, etc. Hospitality should not be paid for in regards to meetings of close colleagues working together on a regular basis. However, meals provided during meetings are allowable provided these are reasonable.
3. Hospitality may be extended to Non Capital Health employees, under the following circumstances:
 - (a) when discussions of organizational importance are held with persons who are not Capital Health employees, including interviews with persons who are being considered for recruitment into the organization, members of the government, industry, public interest groups, unions, seminars, or other events/meetings as may be determined by COO/VP or equivalent (Level 4);
 - (b) when Capital Health sponsors formal conferences, (as defined in the *Staff Development Policy*), and other government, health, and business groups are represented;
 - (c) when a person who is not a Capital Health employee renders services without remuneration; or
 - (d) when an event (e.g. opening of a major Capital Health project) takes place attended by distinguished members of government, private sector, or both.
 - (e) With pre approval from COO/VP or equivalent (Level 4), hospitality may take on other forms.
4. The following are guidelines for selection of location to host a hospitality function:
 - (a) All centers and departments must first use Capital Health owned facilities when they are appropriate and available.
 - (b) Off site facilities should be chosen based on their cost effectiveness. This means that the facility costs should be competitive with other off site facilities that can accommodate the type of engagement undertaken.
 - (c) Private residences require prior approval from VP/COO or equivalent (Level 4).
5. Hosting expenses require the following pre-authorization:
 - Claims over \$1,000 - approval of the appropriate COO/VP or equivalent (Level 4).
 - Claims over \$10,000 - approval of the appropriate COO/VP or equivalent (Level 4) and President (Level 2).

Definitions:

Hospitality Function - the provision of a reception/meeting offering refreshments, meals and sometimes entertainment to guests and staff.



Corporate
Administrative
Procedure

Procedure Name: *Employee Expense Claims and Hosting Guidelines*

Number: 4.4.3

Directive Reference: *Employee Expense Claims and Hosting Guidelines*

Date Approved: September 19, 2005

1. Accounts Payable will process employee claims upon submission of an Employee Expense and Travel Claim form that is properly completed in accordance with this and other relevant Capital Health policies.
2. In the employee's absence, the Claim Form may be prepared by the employee's supervisor and authorized by another employee with the appropriate signing authority.
3. All original receipts (including restaurant receipts) must accompany Claim Forms sent to Accounts Payable. If required, Accounts Payable will return original receipts back to the department after processing.
4. Claim Forms should be forwarded directly to Accounts Payable by the authorizer in order to prevent unauthorized changes to the forms.
5. The expense should be coded based on the type of expense, as per approved chart of accounts, and not according to the budget availability.
6. Claims should be submitted in the fiscal year that they have been incurred.
7. Accounts Payable will initiate payment when the cumulative amount owing exceeds \$15 CDN or \$10 US except that on employment termination all amounts owing will be paid to the individual.

References

Corporate Administrative Directive 4.4.1– Delegation of Signing Authority
Human Resources Policy – 9.02 Travel Expenses



HUMAN RESOURCES
Policy

Policy Name: Travel Expenses **Section:** Travel & Relocation **Number:** 9.2
Date Approved: September 6, 1999 **Approved By:**
Date Revised: November 23, 2004
July 29, 2005; February
24, 2006; May 2006

Vice President – Human Resources

1. Policy

Capital Health provides reimbursement to employees for authorized travel and related expenses for business, education, or other purposes as approved by Capital Health for the benefit of the organization. Expenses for travel which is 150 kilometers or less one way from the boundaries of Health Region #6 and which does not require overnight accommodation is addressed through the Corporate Administrative Directive, Mileage Reimbursement.

2. Application

All Capital Health employees.

Where a collective agreement varies from the provisions of this policy, the collective agreement reference prevails.

3. Procedures

3.1 Travel and Expense Guidelines

3.1.1 Annual travel budgets are the responsibility of the operating site/sector.

3.1.2 An employee's request for travel expenses is approved in advance by their Director or Manager for travel within the province and by their Vice President/Senior Operating Officer/Chief Operating Officer for out of province travel, using the Capital Health Travel Approval Form/Request for Advance (Attachment 1 – CH-0198). A copy of the Travel Approval Form must be forwarded to Accounts Payable prior to the travel date as evidence of advance payment authorization.

Any exceptions to this policy must be documented and approved by the department's COO/VP and Executive Vice President and Chief Financial Officer and forwarded to Accounting Services.

3.1.3 The following types of reasonable expenses may be considered:

- a) Transportation;
- b) Accommodation;
- c) Vehicle rental (if justifiable, see 3.1.4 of this policy)
- d) Taxi, bus, parking, etc.;

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- e) Food and Beverages;
- f) Official Telephone Calls;
- g) Additional out of country medical insurance premiums cost, if required.

3.1.4 Charges for renting vehicles, if justifiable, are reimbursable. If practical such charges should be pre-determined and are pre-authorized. Personal accident insurance is not required. Insurance premiums for collision coverage, however, could be purchased and is reimbursable.

3.1.5 Travel advances may be provided on request for travel expenses exceeding \$500.00 in total, excluding airfare expenses. Travel Advance requests requires approval by the employee's Director or Manager.

3.1.6 A standard daily food and beverage allowance of up to \$38.45 CDN (inside Canada) and \$38.45 US (outside Canada) is allowed to cover expenses on a per diem basis as per the following:

Breakfast	\$ 8.50
Lunch	\$10.75
Dinner	<u>\$19.20</u>
	\$38.45

Reasonable expenses beyond the per diem may be reimbursed upon submission of actual expenses, provided that a claimant must submit either actual expenses in whole or be paid the per diems for the whole of the period of absence.

3.1.7 Meal allowances may be claimed under the following circumstances:

- a) Breakfast - departure time is earlier, or return time is later than 7:00 am;
- b) Lunch - departure time is earlier, or return time is later than 1:00 pm;
- c) Dinner - departure time is earlier, or return time is later than 7:00 pm,

subject always to the proviso that no meal allowance can be claimed if the meal is included as part of the airfare or as part of registration or conference fees.

3.1.8 Personal expenses relating to telephone calls and entertainment are not allowable expenses except for reasonable costs of telephone calls to the employee's home/work location to a maximum of two (2) calls per twenty-four (24) hour period of absence subject to discretion in extenuating circumstances.

3.1.9 Reasonable laundry and/or dry-cleaning expenses may be claimed after forty-eight (48) hours of absence while continuing on travel status.

3.1.10 If an employee's car is used as the mode of transportation for out of town travel, approved expenses are based on the current mileage rate up to a

maximum of economy airfare plus reasonable ground fare between the airport and work related destinations.

3.1.11 Reasonable hosting expenses may be allowed subject to approval, submission of receipts and identification of individuals hosted.

3.1.12 Any exceptions to this policy must be documented and approved by the department's Chief Operating Office/Vice President and Executive Vice President and Chief Financial Officer and forwarded to Accounting Services.

3.2 Travel Procedures

3.2.1 Travel and Accommodation Arrangements

- a) Travel requiring overnight accommodation or air reservations must be approved in advance using the Travel Approval Form (Attachment #1, CH-0198)
- b) Subject to emergency or short notice situations approved by the VP/SOO/COO, the Travel Approval Form should be sent to Accounts Payable in Finance at least two (2) weeks in advance of the travel date.
- c) Upon approval of travel, designated Travel Coordinators authorized to arrange travel initiate reservations. These individuals will book directly with the travel agent designated by Capital Health.
- d) Travel agents will verify with Finance and will book the most appropriate and economical flight and accommodations available.
- e) The travel agency delivers tickets and itinerary directly to the employee or to the Travel Coordinator for appropriate distribution.

3.2.2 Travel Expense Claims

- a) Upon return, employees must fill in the actual allowable costs (transportation, accommodation, meals, taxi/bus, etc) on the Travel Expense Claim Form (Attachment #2, CH-0313) along with original receipts as required.
- b) Employee submits a completed Travel Expense Claim Form to their immediate management supervisor for approval and forwards to Accounts Payable within one week upon return from travel.
- c) If the total of the travel advance exceeds the total actual approved expenses, the completed Travel Expense Claim Form must be forwarded to Finance with the balance amount due to Capital Health.

3.3 Medical Coverage Outside of Canada

Employees traveling outside of Canada on business or approved education purposes should check with the site benefits section to determine the extent of medical coverage provided through Alberta Health Care and/or benefit plans. Management/Exempt employees have coverage up to \$1,000,000 (Canadian) for a period of thirty (30) days plus 72 hours in extenuating circumstances under the benefit plan in effect as of December 31, 1996. The Provisions of benefit plans, however, may vary from time to time. It is the responsibility of the employee to ensure appropriate medical insurance coverage exists for out of country travel.

WCB related claims during each period of approved leave are assessed in accordance with the normal process.

4. Authorities

- Alberta Blue Cross Contract #19999
- Alberta Health Care Act - Out of Country Medical Coverage

5. References

- Corporate Administrative Directive 5.2.1: Mileage Reimbursement/Car Allowance

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HUMAN RESOURCES Policy

Policy Name: Travel Expenses **Section:** Travel & Relocation **Number:** 9.2
Date Approved: Sept. 6/99; Nov. 23/04; **Approved By:**
Date Revised: July 29/05; Feb. 24/06; May *J. McPhail*
2006; Feb. 20/07

Vice President – Human Resources

1. Policy

Capital Health provides reimbursement to employees for authorized travel and related expenses for business, education, or other purposes as approved by Capital Health for the benefit of the organization. Expenses for travel which is 150 kilometers or less one way from the boundaries of Health Region #6 and which does not require overnight accommodation is addressed through the Corporate Administrative Directive, Mileage Reimbursement.

2. Application

All Capital Health employees.

Where a collective agreement varies from the provisions of this policy, the collective agreement reference prevails.

3. Procedures

3.1 Travel and Expense Guidelines

3.1.1 Annual travel budgets are the responsibility of the operating site/sector.

3.1.2 An employee's request for travel expenses is approved in advance by their Director or Manager for travel within the province and by their Vice President/Chief Operating Officer/Senior Operating Officer for out of province travel, using the Capital Health Travel Approval Form/Request for Advance (Attachment 1 – CH-0198). A copy of the Travel Approval Form must be forwarded to Accounts Payable prior to the travel date as evidence of advance payment authorization.

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- a) Transportation;
- b) Accommodation;
- c) Vehicle rental (if justifiable, see 3.1.4 of this policy)

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- d) Taxi, bus, parking, etc.;
- e) Food and Beverages;
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- g) Additional out of country medical insurance premiums cost, if required.

3.1.4 Charges for renting vehicles, if justifiable, are reimbursable. If practical, such charges should be pre-determined and are pre-authorized. Personal accident insurance is not required. Insurance premiums for collision coverage, however, could be purchased and is reimbursable.

3.1.5 Travel advances may be provided on request for travel expenses exceeding \$500.00 in total, excluding airfare expenses. Travel Advance requests requires approval by the employee's Director or Manager.

3.1.6 A standard daily food and beverage allowance of up to \$50.00 CDN (inside Canada) and \$50.00 US (outside Canada) is allowed to cover expenses on a per diem basis as per the following:

Breakfast	\$10.00
Lunch	\$15.00
Dinner	<u>\$25.00</u>
	\$50.00

Reasonable expenses beyond the per diem may be reimbursed upon submission of actual expenses, provided that a claimant must submit either actual expenses in whole or be paid the per diems for the whole of the period of absence.

3.1.7 Meal allowances may be claimed under the following circumstances:

- a) Breakfast - departure time is earlier, or return time is later than 7:00 am;
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subject always to the proviso that no meal allowance can be claimed if the meal is included as part of the airfare or as part of registration or conference fees.

3.1.8 Personal expenses relating to telephone calls and entertainment are not allowable expenses except for reasonable costs of telephone calls to the employee's home/work location to a maximum of two (2) calls per twenty-four (24) hour period of absence subject to discretion in extenuating circumstances.

3.1.9 Reasonable laundry and/or dry-cleaning expenses may be claimed after forty-eight (48) hours of absence while continuing on travel status.

- 3.1.10 If an employee's car is used as the mode of transportation for out of town travel, approved expenses are based on the current mileage rate up to a maximum of economy airfare plus reasonable ground fare between the airport and work related destinations.
- 3.1.11 Reasonable hosting expenses may be allowed subject to approval, submission of receipts and identification of individuals hosted.
- 3.1.12 Any exceptions to this policy must be documented and approved by the department's Chief Operating Officer/Vice President and Executive Vice President and Chief Financial Officer and forwarded to Accounting Services.

3.2 Travel Procedures

3.2.1 Travel and Accommodation Arrangements

- a) Travel requiring overnight accommodation or air reservations must be approved in advance using the Travel Approval Form (Attachment #1, CH-0198)
- b) Subject to emergency or short notice situations approved by the VP/COO/SOO, the Travel Approval Form should be sent to Accounts Payable in Finance at least two (2) weeks in advance of the travel date.
- c) Upon approval of travel, designated Travel Coordinators authorized to arrange travel initiate reservations. These individuals will book directly with the travel agent designated by Capital Health.
- d) Travel agents will verify with Finance and will book the most appropriate and economical flight and accommodations available.
- e) Staff is expected to travel for the lowest economy class or at excursion rates. Exceptions may be allowed in the case of a disability, medical, business reason for senior executive and other reasons subject to written pre-approval of the appropriate Executive Vice President or President. Travel funded through the research and grant funds will require approvals based on the conditions under the appropriate grant agreement.
- f) The travel agency delivers tickets and itinerary directly to the employee or to the Travel Coordinator for appropriate distribution.

3.2.2 Travel Expense Claims

- a) Upon return, employees must fill in the actual allowable costs (transportation, accommodation, meals, taxi/bus, etc) on the Travel Expense Claim Form (Attachment #2, CH-0313) along with original receipts as required.

- b) Employee submits a completed Travel Expense Claim Form to their immediate management supervisor for approval and forwards to Accounts Payable within one week upon return from travel.
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WCB related claims during each period of approved leave are assessed in accordance with the normal process.

4. Authorities

- Alberta Blue Cross Contract #19999
- Alberta Health Care Act - Out of Country Medical Coverage

5. References

- Corporate Administrative Directive 5.2.1: Mileage Reimbursement/Car Allowance



HUMAN RESOURCES
Policy

Policy Name:	Employee Education Fund (for education support for Certification, Diploma, Designation, Graduate and Post Graduate Programs)	Section:	Staff Development and Organizational Change	Number:	7.2
Date Approved:	August 2, 2007	Approved by:	<i>John McPhail</i>		
Date Revised:					

Vice President – Human Resources

1.0 Policy

Capital Health is committed to continuous learning and employee development to optimize individual competence (knowledge, skills and abilities). Consistent with the priorities of the organization and funding availability, Capital Health may provide support to employees for the purpose of furthering their job-related education.

1.1 Guiding Principles

Support for education is provided in a fair and consistent way across the Capital Health Region.

The level of support is determined by considering both organizational priorities and individual development needs.

Investment in educational activities (time, cost) should be shared by both the organization and the employee in a way that reflects the benefits to be gained by each party.

1.2 Eligibility

Regular Employees of Capital Health (full time or part time, in-scope or out-of-scope) who have successfully completed their probationary period and are currently working a minimum of 0.4 FTE are eligible to apply for education support.

The employee shall provide written proof of program registration from the educational institution offering the program of study.

1.3 Sources of Funding

The Employee Education Fund, Operating Budget, and other funds managed by Capital Health.

The “Capital Health Employee Education Fund” will only subsidize program costs (registration, tuition and required program materials) associated with the completion of an educational program approved by Capital Health. Funds will be paid from the “Capital Health Employee Education Fund” to the educational institution.

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Employees applying for education support shall declare whether they are in receipt of separate financial aide (e.g. bursary, scholarship, fellowship, teaching or working assistantship) for the program being considered.

1.4 Education Support

Education support may take the form of full or partially paid education leaves and/or full or partial program costs associated with the completion of a certificate, diploma, degree, designation, graduate or post graduate program of study provided by an educational institution approved by Capital Health.

1.5 Calculation of total value of Education Request

Total value of education request is calculated by adding the value of paid education leave granted and the education program costs paid by Capital Health.

Value of paid education leave (# hours paid education leave X current hourly wage)	+	Education program costs paid by capital health (registration, tuition, required materials)	=	Total education support
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Example:

• 20 days paid education leave (155 hours X \$30/hour)	=	\$4,650
• <u>Tuition and program materials</u>	=	<u>\$20,000</u>
TOTAL:		\$24,650

Program costs may include registration/tuition/exam fees and/or required books/materials.

The following costs will not be subsidized:

- travel accommodation and food
- fees for supplemental, re-write, challenge, or make-up examinations
- fees for transcripts
- membership fees
- late fees

Where a collective agreement varies from the provisions of this policy, the collective agreement reference prevails.

1.6 Level of Education Support

Operational managers shall recommend level and type of support provided based on the points system noted below, funds available and the ability to provide coverage for the employee's duties and responsibilities while they are on education leave.

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The combined financial assistance for education support granted to an employee is limited to a maximum of 100% of their current **base** salary at the time of application.

The level of education support is determined based on:

- Alignment of the proposed education program with organizational needs and priorities and
- Alignment with individual development/career priorities.

The following point system is to be used to establish the level of support provided by Capital Health.

a. Aligns with Organizational Priorities – Select all that apply

	<u>Points</u>
• Not aligned with organizational priorities	0
• Partially aligned with organizational priorities	1
• Fully aligned with organizational priorities	2
• Qualifies employee for positions identified as “hard to recruit” as defined by Human Resources	1
• Program is required by Capital Health	2

b. Aligns with Individual Development Goals – Select 1

	<u>Points</u>
• Not aligned with individual development goals	0
• Somewhat aligned with individual development goals	1
• Fully aligned with individual development goals	2

c. Develops Competencies Required for Advancement and/or Succession Planning – Select 1

	<u>Points</u>
• Does not develop competencies required for advancement	0
• Develops some competencies required for advancement	1
• Develops all competencies required for advancement	2

Total the points to establish level of education support as follows:

<u>Points Total</u>	<u>Percentage of Support Provided by Capital Health</u>
2	• 0 – 30% of request funded
3 – 4	• 30 – 50% of request funded
5 – 6	• 50 – 70% of request funded
7 – 9	• 70 – 100% of request funded

(Total funding limited to a maximum of 100% of current base salary at time of application.)

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1.7 Return Service Commitment

For education support greater than or equal to \$5,000.00 employees are required to make a return service commitment to Capital Health. Return service agreements will be made in writing prior to the start of the education program and/or paid education leave. Return service is calculated as follows:

<u>Total Education Support</u>	<u>Return Service Commitment</u>
• \$5,000 - \$15,000	1 Year
• \$15,000 - \$25,000	2 Years
• Over \$25,000	3 Years

The employee will commence the return service commitment following the completion of the education program.

1.7.1 Repayment:

- If an employee leaves the employment of Capital Health before completing the program of study or does not successfully complete the program of study the employee is required to repay Capital Health for the total amount of the program costs paid by Capital Health.
- If an employee leaves the employment of Capital Health before fulfilling the Return Service commitment, the employee is required to repay a percentage of the program costs consistent with the percentage of the return service commitment that has not been completed.
- Where circumstances beyond an employee's control make it impossible to complete the program of study or fulfill the return service obligation, the Vice President of Human Resources may waive the repayment of funds and/or return service commitment.

1.8 Approvals

All requests for Education Support associated with the completion of a certificate, diploma, degree, designation, graduate or post graduate program of study provided by an educational institution approved by Capital Health shall be approved by the appropriate Vice-President/Chief Operating Officer.

Requests for funding from the "Capital Health Employee Education Fund" must be forwarded by the requesting Vice President/Chief Operating Officer to the Director of Staff Development and Organizational Change and be approved by the Vice-President Human Resources to ensure the funds are administered in a fair and consistent manner.

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2.0 Application

This policy applies to those education programs that will require a commitment of time or financial support towards the completion of a certification, diploma, degree, designation, graduate or post graduate program. Note: This policy does not apply to attendance at conferences, seminars or individual courses (see HR Policy No. 7.1).

3.0 Procedures

- 3.1 The employee makes a written request for education support by completing the Application for Education Support Form.
- 3.2 The manager reviews application and indicates recommended level of support, potential source of funding, identifies return service requirement as appropriate and forwards request to appropriate Vice President/COO.
- 3.3 The application is forwarded to Staff Development and Organizational Change by the Vice-President/COO when:
 - Funds are being requested from the Capital Health Employee Education Fund and/or
 - A Return Service Agreement is required (Education Support requested is greater than or equal to \$5,000.00).
- 3.3.1 Staff Development and Organizational Change will review applications and prepare Return Service Agreements and other documentation as required.
- 3.3.2 When support is being requested from the Capital Health Employee Education Fund, Staff Development and Organizational Change will forward the Application to the Vice President Human Resources for approval.
- 3.3.3 Staff Development and Organizational Change will send signed documents to the initiating manager.
- 3.4 The Manager will forward copies of all approved application forms and agreements to Site/Sector Human Resources for inclusion in the employee file.
- 3.5 The employee shall provide written proof of program completion to their manager who will forward copies to Staff Development and Organizational Change.

4.0 Authorities

5.0 References:

- CAD 6.3.2.1 Appropriate Use of Information Delivery/Exchange Systems
- CAD 6.3.2.4 Security of Equipment and digital Storage Media
- HR Policy 7.1 Staff Development and Training
- HR Policy 3.3.2 Leave of Absence – General
- HR Policy 9.2 Travel Expenses

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Capital Health
EDMONTON AREA

Application for Education Support
For Certificate, Diploma, Degree, Designation, Graduate
and Post Graduate Programs

PART I: to be completed by Applicant

Employee's Name: _____

Current Position: _____

Title: _____ FTE: _____

Site/Sector: _____

Address: _____

Home Phone Number: (780) _____ - _____ Work Phone Number: (780) _____ - _____

Expected period of time to complete program:

From: _____ **To:** _____

(Date) (Year) (Date) (Year)

Description of Education Program, e.g. certificate; diploma; degree; designation, etc.

Description of Education Support Requested, e.g. time; program; costs.

Registration -
Tuition -
Required Materials -
Total program costs:

Number of days paid education leave requested:
Number of day unpaid education leave requested:

Rationale for request for Education Support

Attach additional pages and/or letter(s) of support as appropriate.

Total Estimated Cost (paid education leave and program cost(s): \$

Third party financial aid being received? Yes No

If "Yes", please specify source and amount: Source: _____

Amount: \$ _____

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Human Resources Policy (continued)

Policy No. (TBD)

PART II – to be completed by Manager

The applicant is a regular employee, has successfully completed the probationary period and is working a minimum of 0.4 FTE Yes No

LEVEL OF EDUCATION SUPPORT (see Policy for point allocation criteria – Article 1.5)

a. Step 1: Determine total cost of education	
• Salary paid during education leave	\$
• Program costs (registration, tuition, required materials)	\$
TOTAL COST OF EDUCATION:	\$
b. Step 2: Level of support	
• Alignment with organizational priorities	Points
• Alignment with individual development goals	Points
• Develops competencies required for advancement or succession planning	Points
TOTAL POINTS:	
RECOMMENDED LEVEL OF SUPPORT:	%
c. Step 3: Calculate total amount of education support request	
$\text{Total cost of education} \quad \times \quad \text{Recommended level of support} \quad = \quad \text{Education support request}$	
\$ _____	_____ %
	\$ _____

RETURN SERVICE COMMITMENT:

• Is education support equal to or greater than \$5,000? Yes No

If “Yes”, send completed application form to appropriate Chief Operating Officer/Vice President who will review and forward to Staff Development and Organizational Change to calculate and draft Return Service Commitment.

SOURCE OF FUNDING:

Capital Health Employee Education Fund - for program costs only (send completed application form to Director, Staff Development and Organizational Change)

Operating Budget

Other - please specify:

Originating Manager: *(Please print)* _____

Signature of Originating Manager: _____

APPROVALS	
Education Support Request	_____ <i>COO/VP (Please Print)</i> _____ <i>COO/VP Signature</i>
Request for support from the Capital Health Employee Education Fund	_____ <i>VP – HR (Please print)</i> _____ <i>VP – HR Signature</i>



Corporate
Administrative
Directive

Directive Name: Mileage Reimbursement/
Car Allowance

Number: 5.2.1

Date Approved: August 2008

Revised: November 29, 1996, September 15, 2003
August 2008

Approved by: 

Regional Liaison

Capital Health employees using personal vehicles on CH business are reimbursed at a standard rate per kilometer driven plus reimbursement of up to \$500/year for vehicle business insurance.

Limitations:

- This directive will not apply to those unionized staff where existing collective agreements require a different payment amount and/or reimbursement structure.
- This directive will not apply to individuals where a different car allowance arrangements has been pre-authorized or calculated and included as part of the individual's income.

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Corporate Administrative Procedure

Procedure Name: Mileage Reimbursement/Car Allowance/Taxi and Bus Fare

Number: 5.2.1

Directive Reference: Mileage Reimbursement/Car Allowance

Date Approved: August 2008

Revised: November 29, 1996, September 15, 2003
December 14, 2004, June 1, 2005

-
1. Capital Health staff using personal vehicles or other forms of local transportation for CH business will complete a local "Travel Expense Claim Form" (Form CH-0313).
 2. Prior to being submitted to Financial Services, the expense claim must be signed by both the employee and the employee's departmental director, except when the said employee is a Director or higher in which case the expense claim must be signed by the employee's immediate supervisor (refer to Corporate Administrative Directive "Delegation of Signing Authorities").
 3. Any claims for parking fees, taxi or bus fare must be accompanied by actual receipts.
 4. Employees have the responsibility to ensure insurance coverage through their own automobile insurance company for business travel and, in the event of additional charges for such coverage, may be reimbursed up to \$500 annually upon the presentation of proof of coverage and additional expenses. Capital Health does not cover for use of vehicle between home and work.
 5. Where the employee is obtaining business vehicle insurance part way through the fiscal year, the \$260.00 allowance or actual amount (whichever is less) will be prorated accordingly.
 6. Mileage will be paid for business travel between locations, after first arriving at work, to any location within the region, unless specifically provided otherwise for an employee or a group/classification of employees. Mileage may be claimed as outlined in Attachment #2 One Way Travel Distances Between Capital Health Sites. A detailed mileage chart of all Capital Health locations is available on the Capital Health Intranet at:
<http://www.intranet.cha.ab.ca/policies/s5/5.2.1%20Detailed%20Mileage%20Chart.xls>
 7. Use Travel Expense Claim Form #CH-0313 August 2008

Corporate Administrative Directive: Mileage Reimbursement /Car Allowance

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Date Issued: December 1996, Revised: September 15, 2003, December 14, 2004, June 1, 2005, August 2008

Originator: Human Resources