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 Administrative
 Human Resources

Applies to Facilities:

Applies to Departments:

Procedure : Business Travel Reimbursement

I. PURPOSE:

To provide guidelines for Palomar Health employees, physicians, board members, and Palomar Health hired consultants when traveling for Palomar Health in an official capacity. The guidelines will detail the procedure for requesting mileage reimbursement when working at a facility other than their home facility, travel arrangements to conduct Palomar Health business and/or participation in approved professional meetings, conferences, or seminars and to minimize the related costs of such travel.

II. DEFINITIONS:

- A. Traveler(s) - Traveler shall include Palomar Health employees, physicians, board members and Palomar Health hired consultants. The term "Traveler" or "Travelers" shall apply equally to all employees, physicians, board members, and consultants unless otherwise specifically indicated.
- B. Approver - The Palomar Health management staff person(s) authorized to approve travel.
 - 1. Approver is defined as at least one level up the chain of reporting from the Traveler, but at the minimum at a Director level.
- C. Department - Cost center to which the Traveler has been assigned.
- D. Home Facility: Facility or location for which the employee has been hired to work the majority of their hours as established by the primary position in Lawson (position #1).

III. STANDARDS OF PRACTICE:

A.

IV. STEPS OF PROCEDURE:

A. Mileage Reimbursement:

- 1. An employee who is required to travel to a facility other than his/her home facility will be compensated for mileage costs. The mileage paid will be equal to the round trip mileage between their home facility and the facility to which they are required to travel.
- 2. The employee will submit a mileage reimbursement request monthly to his/her department manager in order to be paid for the travel to facilities other than his/her home facility. Reimbursement will be at the approved Palomar Health rate per mile for travel for a given year.

B. Traveler Responsibilities:

- 1. It is the responsibility of all Travelers requesting travel arrangements to complete the following prior to booking travel:
 - a. The established Business Travel Reimbursement Form
 - I. This form will be included in the contract for consultants.
 - b. Obtain the necessary approvals from the appropriate Approver of the Traveler's Department prior to forwarding the request for travel arrangements to Accounts Payable for processing.
- 2. Transportation Expenses (Air Travel):
 - a. Reservations: All air travel reservations should be made through Internet sites such as Expedia, official airline web sites, or the airline reservations desk. Reservations should be made as early as possible in order to obtain the lowest, logical fare. Personal preference for air carrier shall never be a consideration.
 - b. Weekend or Extended Stay: Extended stays or weekend stays for personal reasons or convenience are allowable provided the total amount reimbursed does not exceed the amount calculated for business purposes, as long as the traveler's work schedule will not be adversely impacted. Expenses for additional accommodations, meals, and related expenses must be taken into account when comparing airfares for alternate travel days.

i. Example:

- I. Cost of airfare for Sunday Travel.....\$650
- II. Total costs of Saturday travel plus additional meals and Saturday night's accommodation.....\$600
- III. Traveler's work schedule would not be impacted.

- c. Supporting documentation to demonstrate the cost comparison must be provided to Approver prior to travel, and included with the final expense report.
- d. Annual Fees: Palomar Health will not pay or reimburse for: 1) annual airline travel club membership dues, or 2) annual mileage program fees.
- e. Upgrades: Under no circumstances will approval be allowed for upgrades to business or first class travel.
- f. Change Fees: Any change penalties or fees are only reimbursable when the change is made at the request of the appropriate Approver.
- g. Air Travel Changes While En Route:
 - i. If an airline ticket is exchanged or modified as a result of itinerary changes that result in a fare increase, the documentation for original fare and fare increase should be submitted using the travel arrangements request Business Travel Reimbursement Form.
- h. Canceled Flights: If a carrier for any reason cancels a flight, the Traveler may make new travel arrangements if no additional cost is incurred over the original cost of the airfare. If additional costs must be incurred to meet the scheduling priorities of the Traveler, the Traveler will include the additional transportation charges for reimbursement on their final Business Travel Reimbursement Form submission.
- i. Bumping: The Traveler may keep compensation for voluntary bumping from an air carrier if the air carrier requests volunteers for bumping. The Traveler may accept voluntary bumping if the Traveler's new arrival time is after business hours and does not interfere with the next business day's activities or result in additional costs to Palomar Health.
- j. Frequent Flier Awards, Premiums, Free Tickets:
 - i. The Traveler may not use frequent flier or other bonus coupons as reimbursable payment for business flights.
 - ii. The Traveler is not allowed to specify the carrier or routing to earn frequent flier miles. Any premiums, such as free tickets or frequent flier awards, are the property of the Traveler. Travelers will not be reimbursed for any free airline tickets received from air mileage programs and used for Palomar Health purposes.

3. Hotel/Lodging Accommodations:

- a. Travelers must make room reservations that ensure the lowest rate.
 - 1. When traveling to San Diego, Travelers are recommended to use Palomar Health contracted hotels. If the Traveler chooses to use another hotel, reimbursement will not exceed the Palomar Health contracted rate.
 - 2. Out of area travel hotel rates need to be approved in advance by the Approver.
- b. Hotel/Lodging reimbursement will only include the daily rate, applicable lodging taxes, and Internet service. Palomar Health will not reimburse Traveler for discretionary room charges, including but not limited to gym fee, stock bar, laundry services, etc.
 - i. Internet usage reimbursement for consultants will be included in their contracts.

4. Car Rentals, Cabs, Parking, etc.

- a. Car rental will be paid for by the Traveler and submitted on the Business Travel Reimbursement Form. Car rentals will include only economy cars. The purchase of insurance is not included, reimbursable expense; however, Travelers may purchase additional insurance at their own expense.
- b. Travelers should use shuttle vehicles when available.
- c. Cab, parking, and car rental fees must be paid by the Traveler and submitted on the Business Travel Reimbursement Form.
- d. Car mileage must be submitted on the Business Travel Reimbursement Form.
- e. The lowest cost alternative will be the prevailing factor in choosing between car rental, shuttle, taxi or other forms of paid public transportation.

5. Per Diem Expenses:

- a. Travelers will be allowed the current IRS Per Diem Rate to use on meals and incidental expenses. Finance will revise the Reimbursement Form annually to reflect the IRS rate updates for mileage and Per Diem. Per Diem rates to cover all travel dates.
- b. Unless the sponsored activity is sanctioned by Palomar Health, Palomar Health will not reimburse for use of alcohol without the consent of the Approver. Receipts will be submitted with the Business Travel Reimbursement Form if the use of alcohol has been approved.

6. Exceptions:

- a. Unless prior approval is obtained from the Approver of the trip, arrangements made outside this standard of practice will not be honored for reimbursement by Palomar Health.
- b. If the Traveler chooses travel other than by air, mileage reimbursement will not exceed the cost of airfare.
- c. Travelers (as defined above) will be responsible for reservations and other incurred expenses of non-travelers.

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Approvals

- Committees:
- Signers: *Geoffrey Washburn*

Geoffrey Washburn, Chief Human Resources Officer
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Attachments: Leadership and Management
(REFERENCED BY THIS DOCUMENT) PPH Contracted Hotels

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