

## NOTES REGARDING TRAVEL EXPENSES

### Brigham & Women's/Partners Health Care/Cancer and Leukemia Group B Business Expense Report Forms

**PLEASE READ THE FOLOWING INFORMATION REGARDING UPDATED TERMS OF THE TRAVEL POLICY  
AS OF 4/1/2010  
RECEIPT REQUIREMENTS HAVE SIGNIFICANTLY CHANGED**

#### The Following Must Be Included for a Complete Expense Report:

- A completed and signed Expense Report
- All itemized original receipts – regardless of amount
- If airfare is being claimed: a receipt with payment documentation
- If airfare was directly billed: boarding pass or flight itinerary
- If mileage is being claimed: MapQuest (Google, Yahoo, etc.) directions with mileage
- A meeting agenda or brochure if not a CALGB organized meeting

#### Allowable Transportation

- Round-trip Coach Class advance purchase airfare on a US-flag carrying airline. Travelers are required to purchase flights at the lowest possible fare and arrive into and depart from the same airport unless a documented business reason is approved in advance. **Airfare above \$500 requires advance approval regardless of travel agency used or method of purchase.** Approvals are to be submitted to Katherine Faherty for all meeting-related and individual travel or Barbara Barrett for Audit Committee Travel only. International travel requires special approval.
- **Tickets must be booked at least seven days prior to departure. Ticket changes resulting in a fee are the responsibility of the traveler or their institution without prior approval from the Group Chair's Office.**
- For travel via trains, round-trip Standard Coach Class or Business Class will be reimbursed.
- Documentation for transportation must provide the ticket number and proof of payment information (i.e., must show a zero balance due). If you only have an itinerary without proof of payment, please include a copy of your credit card statement or cancelled check.
- Personal Car Mileage reimbursement is provided at **50¢** per mile (as of 1/1/10) up to the equivalent of the cost of advance purchase round-trip coach class airfare. Please include a MapQuest or Google printout as documentation of requested mileage.

#### Lodging

- Single room rate, including tax, at the designated meeting hotel. **A maximum of 3 nights will be covered. The original zero balance hotel receipt is required.** A statement showing a balance will not be accepted for reimbursement.

#### Meals

- **The following per person limits apply for meal reimbursement (including food, non-alcoholic beverage, tax, gratuity, and any room service fee):**
  - Breakfast \$20/person (approximately \$15.00 food and beverage with 18% tip and tax)
  - Lunch \$30/person (approximately \$22.50 food and beverage with 20% tip and tax)
  - Dinner \$65/person (approximately \$45.00 food and beverage with 20% tip and tax)
- **Actual and reasonable expenses are reimbursable during out of town travel.**
- Mini-bar charges or snacks will not be reimbursed unless they are incurred in lieu of a meal.
- Please only submit your personal meals while traveling on CALGB business and an **original paid itemized receipt is required for ALL expenditures.**
- **All Business Meals require an original paid itemized receipt, regardless of amount.** To be reimbursed for a Business Meal, please include the date, place, specific business purpose of meal, and the names of the individuals who are eligible for reimbursement and their institution.

#### Transportation

- Allowable ground transportation is limited to the most economical means of transportation that provides a reasonable level of comfort and convenience. By definition, the "most economical means" includes the use of available public transportation, airport transfer services, a personal auto with mileage and parking reimbursement or local taxi service.
- **Limousine or private car services are not reimbursable expenses**

### Reimbursable Incidentals

- Tips, tolls, parking fees, airport shuttle expenses, and personal car mileage between home and airport. Business phone calls, telegrams, copies, faxes, postage & mailing only if related to CALGB business. **Receipts and/or documentation are required.** Expenses for rental cars will be reimbursed only up to the cost of the round-trip airport shuttle or maximum allowable cab fare that is published in the meeting announcement.

### The Following are Non-Reimbursable Expenses

- Expenses not directly related to the business purpose of the travel or any personal expenses incurred while traveling.
- Travel extended beyond the dates of the business purpose.
- Alcoholic Beverages – with meals or as mini-bar expense
- Meals taken elsewhere when there is a CALGB hosted meal function.
- Meals for non-reimbursable travelers
- In-Room Movies
- Health Club Fees
- Flight upgrades including, but not limited to, Economy Plus, Business, or First Class Airfare
- Travel that is booked less than 7 days prior to departure often resulting in premium pricing in addition to the unavailability of the discounted class of service
- First Class Train Tickets
- Limousine or private car service
- Valet parking when self parking is available or easily accessible

### Receipts

- **Dated original receipts must be submitted for ALL conference, travel/transportation, lodging, and meal expenses claimed on the expense report, regardless of amount.**
- Original airline passenger coupon/receipt, train ticket stub, hotel bill, and automobile rental agreement are required regardless of the dollar amount.
- Monthly credit card statements are not considered original receipts for purposes of this section.
- Minimum requirements for E-Tickets includes: Passenger name; Issue date; Ticket number or other proof of payment; Total payment; Itinerary or routing; Payment Type.

### Lost Receipts

Travelers who lose required receipts should seek a duplicate receipt if possible. **If a duplicate is unobtainable, the traveler must place an asterisk (\*) next to the individual expense on the Business Expense Report to indicate that the receipt was not obtainable, and must submit other records or evidence (such as paid bills, or whatever other document(s) best substantiates or reflects the details of the paid expense) to corroborate the information about the expense provided in the Business Expense Report or other required documentation.** Expenses that are not supported by required receipts or other records or evidence acceptable to PHS will not be paid or reimbursed.

Your personal signature is required on the line marked "Employee Signature." Mail the Expense Report, with all original receipts, to the Chair's Office within two weeks following the trip. **Expenses received after 180 days of the completion of the travel cannot be accepted.**

Step-by-step instructions for completing expense vouchers are located at: [www.calgb.org](http://www.calgb.org)

**Reimbursement should be received within four weeks. When processed for payment, an email will be sent to the address you provide on the expense report. Incomplete Business Expense Reports will be returned causing a delay in payment.**

**Contact Katherine Faherty at 617-732-8919 with questions.  
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