

SUBJECT:		Manual: Policies of The SCAN Foundation	
Grantee/Consultant Travel Reimbursement Policy		Policy Number: 012	
		Number of Pages: 4 Supporting Document Yes X No	
Reviewed By: VP Programs & Operations	Review Date: 01/28/11	Date First Issued: 01/31/11	
Approved By: President & CEO	Approval Date: 1/31/11	Revision #: 6 Date: 2/23/2016	Annual Revision Month: November

Purpose

The purpose of this Travel Reimbursement Policy is to establish guidelines that:

- Describe the types of expenditures that are reimbursable
- Describe the type of expenditures that are not reimbursable
- Provide guidance on appropriate travel procedures

Policy

The SCAN Foundation (TSF) will reimburse grantee representatives, consultants, speakers/presenters, review committee members, and other persons conducting work on behalf of TSF, for reasonable out-of-pocket expenses incurred while traveling to and from events where their attendance was specifically requested by TSF staff (note: this policy applies to people to who travel on behalf of TSF outside a regular grant-funding project. Grantees who have a budget line for travel as part of their grant-funded project should follow their organization's travel policy). All reimbursements for travel expenses **must be submitted within 60 days of event** and are subject to approval by the Program Officers and/or Director of Grants Administration.

Supporting Documents

1. Travel Reimbursement Form

Air Travel

Individuals will be reimbursed for air travel when these policies are followed:

- All air travel must be booked at the lowest available fare for direct travel to and from the destination where the meeting will occur
- Air travel must be booked at least 14 days prior to the event unless the travel request was made at a later point by TSF
- Only economy/coach class fares will be reimbursed
- Flight change fees will not be reimbursed
- SUBMIT: Airline receipt with dates of booking, dates of travel, class of service and total price

Ground Transportation

Individuals will be reimbursed for reasonable ground transportation to and from airports, train stations or bus-depots and traveling to and from the meeting location when these policies are followed:

- Ground transportation must be selected based on the lowest available fare
- No usage of limousines or hired cars/drivers will be reimbursed
- Taxi's, Uber, Lyft, and similar services are permissible.
- SUBMIT: Receipt of the ground transportation with dates of travel and total price

Automobile - Personal

Individuals will be reimbursed for the use of their personal automobile when these policies are followed:

- The cost of traveling by automobile does not exceed the cost of air travel
- Personal mileage reimbursement rate is calculated using the most current mileage reimbursement rate permitted by the IRS
- Mileage must be calculated from the home residence, or place of employment, to the location of the meeting, via the most direct route
- SUBMIT: A printout, showing total mileage from your starting location to your destination

Automobile - Rental

Individuals will be reimbursed for the use of automobile rentals when these policies are followed:

- A rental car is the most economical mode of transportation
- The rental car is mid-sized or smaller

- Adequate full coverage insurance (such as collision & liability) must be obtained by Individuals when renting the car (TSF must be held harmless of any claims arising from rental auto accidents)
- Rental will only be covered for the days actually spent on TSF business
- SUBMIT: A receipt from the car rental company showing all expenses, as well as receipts for gas purchased if not part of the rental agreement, indicating the date, location and amount

Parking

Individuals will be reimbursed for parking when these policies are followed:

- At airports, long-term parking lots must be used unless the person is dealing with a disability
- At restaurants, hotels and other venues, valet parking will only be reimbursed if it is the only option
- Parking validations must be obtained whenever available
- SUBMIT: Parking receipt or credit card print out that shows the payment

Hotel Accommodations

Individuals will be reimbursed for hotel accommodations when these policies are followed:

- The maximum allowed hotel expense is \$350.00 per night (or \$500.00 for Metro Washington, D.C. and New York City hotels)
- The hotel receipt must be itemized, include all room costs and taxes with charges for in-room meals, internet, etc., clearly identified
- Extraordinary services, such as movies, spa, and mini-bar are not reimbursable
- Parking charges will be reimbursed when validations for parking are obtained
- SUBMIT: The itemized hotel bill

Meals

Individuals will be reimbursed for meals when these policies are followed:

- Reimbursement for meals that were provided during the TSF-sponsored meeting (e.g. lunch) will not be considered
- The reimbursement limits per meal are as follows:
 - Breakfast up to \$15.00
 - Lunch up to \$25.00
 - Dinner up to \$40.00
- Breakfast will only be reimbursed for travel starting before 8 am
- Dinner will only be reimbursed for travel extending after 6 pm
- Alcoholic beverages will not be reimbursed

- **SUBMIT:** For meal expenses, the following documentation policies apply per IRS regulation:
 - Add to the bill all name(s) and title(s) of individual(s) with whom the meeting was held
 - The amount of the meal
 - The date, name and location of the establishment
 - The original or scanned restaurant receipt must be included
 - Charge card receipts are NOT acceptable

Expenses without Receipts

Additionally, some expenses will be reimbursed that do not require a separate receipt:

- Reasonable Hotel tips
- Bridge tolls
- **SUBMIT:** Indicate these charges on the TSF Travel Reimbursement Form.

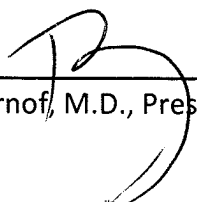
Any exception to the policies above must be requested of and approved in writing by the assigned Program Officer, in advance of incurring the expenses. Any such requests must include the reason for the request. TSF reserves the right to decline such requests.

INVOICE COMPLETION

All items to be reimbursed must be itemized on the attached TSF Travel Reimbursement Form. Original or scanned receipts, along with a W-9 form must be submitted via email or regular mail with the completed invoice **within 60 days of event** to your Program Officer at:

The SCAN Foundation
3800 Kilroy Airport Way, Suite 400
Long Beach, CA 90806

Approved by:



Bruce Chernof, M.D., President & Chief Executive Officer

2/16/14

Date



Please mail to: _____ The SCAN
 Foundation, 3800 Kilroy Airport Way, Suite 400, Long Beach, CA 90806 within 60
 days of event.

Name:		Phone:	
Company Name:			
Street Address:			
City:		State:	Zip code:
Purpose of Meeting:		Date of Meeting:	
Date of Expense (mm/dd/yy)			
Expense			
Air Travel (Total only)			
Hotel Accommodations			0
Car Rental			0
Taxi Shuttle			0
Parking			0
Personal Car Mileage (\$.50 mile)			0
Meals - Breakfast (\$15.00 max)			0
Lunch (\$25.00 max)			0
Dinner (\$30.00 max)			0
Other (please specify):			0
TOTAL			0

Make check payable to:

Example:

John Smith
 1234 Pine Avenue
 Los Angeles, CA 90807

Tax ID # or SS:	

Internal Authorizations:

Approved (PO):	
Date:	
GL #	
GIN #	
Approved (DGA):	