

**INLAND EMPIRE ASSOCIATION OF HEALTH UNDERWRITERS  
POLICY & PROCEDURES**

**POLICY TITLE: Expense Reimbursement**

CLASSIFICATION: Finance/Executive

POLICY NUMBER: 1001

DATE APPROVED: May 3, 2016

APPROVED BY: IEAHU Board of Directors

REVIEW DATE: As needed

**PURPOSE:** Clarification of expenses which are eligible for reimbursement for Board Members when traveling to requested meetings in their Board service.

Notice of Meeting: For any changes to this policy, IEAHU will inform Board members (or chapter representatives). Any changes to this policy will be made by a formal vote of the Board of Directors and communicated to the Board, in writing.

Reimbursement: IEAHU pays expenses to members on a reimbursement basis only. Expenses must be authorized in advance by the Board of Directors. Members must complete a reimbursement form and attach itemized receipts for all expenses. Reimbursement requests must be received within 30 days after the expense and will not be made until all forms are completed and all itemized receipts are received. Only IEAHU members will be reimbursed.

Receipts: Receipts must be attached for all items in excess of \$5.00.

Forms should be emailed or mailed to IEAHU's Executive Director or the IEAHU Treasurer:

[ieahu.administration@gmail.com](mailto:ieahu.administration@gmail.com) or [fern@raymusser.com](mailto:fern@raymusser.com)

IEAHU, PO Box 11088, San Bernardino, CA 92423-1108

Exceptions can be made for large expenditures (over \$750) that would otherwise have to be fronted by the member. For "special request" reimbursements, you must attach the prior approval emailed to you by the IEAHU President, IEAHU Treasurer, or Executive Director.

Meeting Registration: IEAHU will reimburse for the early-bird registration rate (when applicable) for the meeting that the member is representing IEAHU. If member registers after the rate increases, the member is responsible for the difference in registration price.

Mode of travel: IEAHU pays the cost of the lowest fare at the 30-day advance rate for flights. Exceptions will be made when notice of the meeting is made less than 30 days in advance. If there are medical or physical reasons for airline seat upgrades, the additional expense will be covered (up to \$100). Members who opt to drive will be compensated at the rate allowed by the IRS for mileage. Mileage will be based upon a direct route to and from the site. Reimbursement will be limited to the allowable rate for miles or the cost of a direct flight whichever is less. Cabs and shuttles used for transportation to and from meetings will be reimbursed at reasonable rates. Please share cabs and shuttles, if possible. Parking will be reimbursed for meeting venue and hotel parking venue.

Lodging: IEAHU will reimburse for hotel expenses for the required meeting dates. Members who can pair up and share a hotel room at the meeting venue with another IEAHU member are encouraged to do so. If possible, members are encouraged to secure a less expensive hotel nearby the meeting location.

Members must obtain advance permission by vote of the Board of Directors or IEAHU Executive Committee and named in the BOD meeting minutes prior to making travel arrangements. Exceptions can be made for members who register substituting for another member. All members are to keep expenses within the stated budgeted amount per individual for the meeting that they are traveling for their Board service.

Items not allowed: IEAHU does not pay for the following: Meals, alcohol, upgraded expenses (ie. seat upgrades on flights), hotel incidentals, parking, and other extraneous luxuries. Exceptions will be considered for upgraded expenses due to medical necessity up to \$100. IEAHU will not reimburse members for any registration fees, airline tickets or hotel rooms if the member registered but failed to attend the entire event or meeting for any reason.

Mandatory attendance: To be reimbursed for IEAHU meetings, the representative must RSVP in advance to IEAHU. When IEAHU pays for members to attend certain events, it is with the expectation that members will represent IEAHU by attending the important meetings. For example, when members go to the NAHU convention, members are expected to vote at the House of Delegates meeting. If members fail to attend these important functions, IEAHU will not reimburse members' for any expenses.

Timing: IEAHU issues reimbursement checks up to twice a month. Please be prompt in submitting your expense reimbursement.