



ASHI FINANCIAL POLICIES – TRAVEL & MEETINGS

Approved by Board of Directors June 17, 2011

Revised document approved March 29, 2018

I. Requests for Reimbursement – General Policy

- a. **NO REIMBURSEMENTS FOR EXPENSES OVER STATED COST LIMITS WILL BE MADE WITHOUT PRIOR APPROVAL.**
- b. All requests for reimbursement of travel expenses must be submitted on a current ASHI Travel Expense Voucher form (available on the website) within 30 calendar days of the completion of travel. After 30 days following completion of travel, reimbursement requests should be sent to the ASHI Treasurer with an explanation for the delay in submission. If approved, the Treasurer will forward the request to the Executive Director for payment.
- c. Original, fax or scanned copy of receipts for all reimbursable expenses must accompany the Expense Voucher.
- d. Reimbursement will be distributed approximately one month after the approved expense form is received by the ASHI Executive Offices.
- e. ASHI reserves the right to reject any request for travel expense reimbursement that appears unreasonable or where good judgment was not used in selecting travel arrangements. ASHI also reserves the right to request further information for clarification if necessary.
- f. The Treasurer shall review and approve the expense reports of the Executive Director.

II. Airfare – General Policy

- a. Airfare will be reimbursed at the rate of \$700 domestic round trip coach (*June 2011*) and \$1,200 international round trip coach.
- b. ASHI does not pay for spouse/“significant other” airfare.
- c. Travel arrangements must be booked through the travel agency chosen by the ASHI Board of Directors. If a traveler must make other arrangements, prior authorization of the fare must be approved in advance by the ASHI Executive Office.
- d. Once arrangements have been made, the traveler is financially responsible for any alterations to his/her itinerary unless otherwise approved by ASHI staff.
- e. If travel arrangements are not made through the designated agency, trip insurance is highly recommended (at traveler’s expense) as a protection against emergency changes in plans.

ASHI will not reimburse for canceled tickets purchased outside the designated agency.

- f. Coach class (including economy, excursion or promotional seating) must be used. An individual may fly first class by personally paying the difference in airfare. ASHI will not reimburse for first class travel.
- g. Unless circumstances are beyond the traveler's control and prior approval has been obtained from ASHI staff, all airline reservations must be made more than 21 days prior to planned departure.
- h. Direct routes will be booked for most flights. However, per ASHI's instructions, the designated agency will suggest a non-direct flight if savings of over \$100 are available.
- i. The designated agency has been instructed to select the carrier offering the best airfare and route available. A speaker may request, but not dictate, which carrier is selected.
- j. Contact information for the ASHI-approved travel agency is available on the ASHI website.

III. Ground Transportation – General Policy

- a. Limo service is not authorized.
- b. Actual expenses incurred for use of ground transportation (taxis, airport shuttles) will be reimbursed provided original, fax or scanned copies of receipts are submitted.
- c. Gratuities will be reimbursed up to 15% of the fare.

IV. Car Rentals & Personal Automobile Use – General Policy

- a. Charges for a rental car are not authorized for any travel related to an annual meeting or regional workshop.
- b. Lab inspectors requiring car rentals may book the rental through the ASHI travel agency at the time air travel arrangements are requested.
- c. Car rental requires prior approval by the ASHI Executive Director. Car rentals will only be authorized in lieu of air travel or local ground transportation if documentation reflects that the costs of the rental will be less than the lowest available alternative ground transportation (such as taxi cab or shuttle) or airfare. Approved documentation illustrating that a car rental is the most cost effective transportation includes Internet screenshots of websites showing prices for airfare or ground transportation; hard copy quotes or published rates.
- d. When renting a vehicle, individuals should always request a mid-size or smaller car. Additional insurance coverage offered by car agencies is optional. It is the traveler's responsibility to fill up the tank of gas prior to returning the car, to save paying high fees for the car rental agency to refuel the car.
- e. If the traveler elects to drive his/her own car in lieu of air travel, he/she will be reimbursed at the current IRS rate plus tolls and parking up to a total amount not to exceed the cost of air travel (coach class) for the same trip. Gasoline, oil, towing and repair work are not reimbursable.
- f. Travel to and from the airport in the traveler's private car is reimbursed at the current IRS rate per mile plus tolls and parking fees. Parking fees should not exceed the cost of ground transportation by more than 20 percent.
- g. Valet parking is not a reimbursable expense.
- h. Only mileage which is substantiated in writing will be reimbursed. Acceptable proof of miles

driven includes Google Maps or Mapquest (or similar) directions with mileage listed. Odometer readings are not considered written proof.

V. Meals – General Policy

- a. Expenses up to \$75 per day (not per diem) are allowed for meals including gratuities. All expenses must be reasonable and original fax or scanned copies of receipts must be furnished to receive reimbursement.
- b. ASHI does not pay for spouse/significant other meals.
- c. ASHI will reimburse one (1) alcoholic beverage serving with dinner. *(October 2013)*
- d. Gratuities will be reimbursed up to 20% for standard table service.
- e. Gratuities for delivery (pizza, take out, etc.) will be reimbursed up to 10% of the bill.

VI. Hotels – General Policy

- a. Actual lodging expenses are allowed up to \$200 per day (not including taxes) unless circumstances warrant an exception and are approved by the ASHI Executive Director. *(June 2011)* The individual must pay the hotel bill. The only exception is for large group functions sponsored by ASHI where special group arrangements have been arranged and room and tax are to be billed to the master account.
- b. A credit card must be presented for incidental expenses. Appropriate and reasonable expenses will be reimbursed if an original, fax or scanned copy of receipt is provided. Valet parking, personal telephone calls (see “VII-a” below for only exception), movies and dry cleaning are not reimbursable.
- c. ASHI does not pay additional hotel costs for spouse/significant other.
- d. If accommodations are desired other than the official annual conference or regional workshop hotel, prior approval must be granted by the ASHI Executive Offices.
- e. If a room reservation is not required, the ASHI Executive Office should be notified immediately.
- f. If a speaker at the Annual Meeting or Regional Workshop will be presenting for more than two days, special hotel arrangements may be authorized.
- g. The costs of extended stays are reimbursable only if the associated reduction in airfare is sufficient to result in a lower cost for the entire trip. The incremental costs for hotel, meals and ground transportation shall not exceed two days' duration.
- h. Fees for companion pets will not be reimbursed. *(October 2013)*

VII. Misc. – General Policy

- a. Internet connectivity or wireless costs will be reimbursed provided the expense is shown on the hotel invoice or other receipt.
- b. Baggage check fees for one (1) bag per trip will be reimbursed. *(October 2013)*
- c. If combining personal travel with ASHI travel, all personal expenses should be kept separate and not submitted for reimbursement. Examples of expenses that will not be reimbursed include but are not limited to additional hotel charges for companions, excessive transportation fees to and from social dinners/events, bar tabs, additional hotel nights. *(October 2013)*

- d. If while on official ASHI business a traveler's flight is delayed such that an overnight stay is required, ASHI will reimburse any additional expenses incurred for hotel and meals during that delay that are not paid for by the airline. These expenses are subject to the limits outlined in this policy document.

VIII. Reimbursements - Liaisons

- a. **UNOS and NMDP Liaisons:** There shall be no travel reimbursement as UNOS and NMDP cover all travel costs to attend meetings.
- b. **Sister Society Liaisons:** Reimbursement for one (1) night's hotel stay will be allowed if business is carried out on behalf of ASHI during the meeting time. If necessary, two (2) night's hotel stay will be reimbursed. This will be handled on a case-by-case basis and must be approved by the Executive Committee in advance of the meeting.
- c. Reimbursement for any expenses incurred by an appointed liaison must be pre-approved on a case-by-case basis by the Executive Committee. (*November 2013*)

IX. Reimbursements - Professional Standards

- a. **Sister Society Liaisons:** Reimbursement for one (1) night's hotel stay will be allowed if business is carried out on behalf of ASHI during the meeting time. If necessary, two (2) night's hotel stay will be reimbursed. This will be handled on a case-by-case basis and must be approved by the executive committee in advance of the meeting.
- b. **QAS & ARB Exchange with EFI:** The QAS Senior Chair will attend the EFI Standards Meeting, alternating years with the ARB Program Director, with the schedule to be patterned as follows (*January 2012*):
 - 2012 – ARB goes to EFI, EFI standards representative comes to ASHI
 - 2013 – QAS goes to EFI, EFI accreditation representative comes to ASHI
 - 2014 - ARB goes to EFI, EFI standards representative comes to ASHI
 - 2015 - QAS goes to EFI, EFI accreditation representative comes to ASHI

X. Reimbursements – Annual Meeting Speakers/Workshop Leaders

- a. ASHI Members:
 - i. There shall be no honorarium paid (*April 1988*) or reimbursements for hotel (*April 1990*) and travel arrangements, which the members are responsible for making for themselves.
 - ii. The normal meeting registration fee applies and is not waived. (*April 1988*) Reimbursement of workshop materials may be approved by the Program Chair. (*April 1988*)
- b. Non-Members:
 - i. **Air Line Travel** - The speaker should observe the travel requirements described in Section II, Airfare, above.
 - ii. **Hotel Reservations**
 - 1. Hotel accommodations will be provided as outlined in Section VI, Hotels, above.
 - 2. Reservations for speakers will be made at the conference hotel by the ASHI Executive Office as follows:
 - a. For speakers within the North American continent, two night's single room plus tax will be direct-billed to ASHI's master account.
 - b. For speakers outside the North American continent, three night's single room plus tax will be direct-billed to ASHI's master account.
 - iii. **Ground Transportation** is reimbursed as outlined in Section III, Ground Transportation, above.
 - iv. **Car Rentals** are not authorized for speakers.

v. **Meals** are reimbursed as outlined in Section V, Meals, above.

vi. **Honoraria**

1. No honoraria will be given for speaking at ASHI's Annual Meeting.
2. Workshop speakers will not receive an honorarium.

vii. **Conference Registration**

1. Non-member speakers will be allowed to attend the Annual Meeting without payment of the normal registration fee. ASHI staff will register those speakers after receipt of a completed speaker's needs form. (*March 1987*)

XI. Reimbursements – Regional Workshop Speakers

a. **Air Line Travel**

The speaker should observe the travel requirements described in Section II, Airfare, above.

b. **Hotel Reservations**

Hotel accommodations will be provided as outlined in Section VI, Hotels, above, for two (2) nights.

c. **Ground Transportation**

Ground transportation is reimbursed as outlined in Section III, Ground Transportation, above.

d. **Car Rentals** are not authorized for speakers.

e. **Meals** are reimbursed as outlined in Section V, Meals, above.

f. Panel presenters, case study participants and moderators are not reimbursed for travel expenses and are responsible for their own meeting registrations.

g. In order to be reimbursed for travel expenses, speakers must speak for a minimum of 30 minutes.

h. Honorariums are not paid but meeting registration is complimentary.

i. Moderators are not entitled to honorarium, travel or lodging expenses.

XII. Reimbursements – Committee Members

- a. Expenditures for one (1) hotel night and meals for that day will be approved for committee members who are required to come in one day early to attend a pre-conference meeting. (*October 2013*)

XIII. Reimbursements – Award Recipients

- a. Reimbursement will be provided for two (2) lodging nights for the Distinguished Scientist, Distinguished Service and Outstanding Technologist award recipients. (*January 2006*)

XIV. Reimbursements – Lab Inspectors and Other Travel by Individuals

- a. General Policies in Sections I – VII, above apply.

XV. Annual Meeting – Officers’, Board Members’, Committee Members’ & Commissioners’ Expenses

- a. Registration fees, travel expenses and meals as outlined in Articles II – V above will be paid for the President and Program Committee chair. *(July 2000)*
- b. Complimentary rooms will be provided for the President, President-elect, Vice President of Operations and Program Chair. *(June, 2011).*
- c. Except as outlined in “a” and “b,” reimbursable expenses for pre-conference activities are limited to those incurred directly due to the extra day. These would include hotel room and meals. Items not reimbursed include travel to and from home to the airport, travel to the meeting, and travel to and from the airport to the hotel because these are expenses that would have been incurred to attend the annual meeting. *(October 2013)*
- d. Any officer, board member, committee member or commissioner desiring to bring a companion(s) to an ASHI-hosted dinner shall reimburse the Society \$50 per person. *(October 2011)*

XVI. Miscellaneous Meeting Expenses

- a. **Professional Standards:** A meeting of the Professional Standards committees at the annual meeting will be underwritten by the Society. *(June 2011)*
- b. **Regional Workshops:** One (1) \$500 case study award will be given at each regional workshop. *(January 2011 trial basis approved) (October 2011 permanently approved)*
- c. **Travel Grants:** Two (2) travel grants of \$500 for each of the regional workshops (total per year = 4 grants) and two (2) travel grants of \$1,000 each for the annual meeting will be awarded, beginning on a trial basis in 2014. *(June 2013)*