

POLICY**POLITIQUE****National Operating Policy # 8**

Subject: Expense Reimbursement and Cost Sharing
Approved: January 15, 2011 by the National Executive Council
Revised: January 2020

Objective and Rationale

This policy establishes procedures for reimbursement of travel and CIPHI business expenses incurred when conducting CIPHI business. It is CIPHI's policy to reimburse individuals for ordinary, necessary and reasonable expenses when directly related to the transaction of CIPHI business.

Specific Operations**DEFINITIONS:**

BOC – The Board of Certification which includes the Chair, Past or Vice-Chair, Board Members, Secretary of the Board of Certification and Examiners as appointed by CIPHI Branches for the purpose of administering BOC exams.

CoPE – The Council of Professional Experience which includes the Chair, Past or Vice Chair, and Board Members

EHFC – The Environmental Health Foundation of Canada which includes the Chair of EHFC and Board Members.

NEC – The National Executive Council which includes the National President, National President – Elect, Immediate Past President and Board Directors. An Executive Secretary - Treasurer may also be included for the purpose of this policy.

POLICY**Eligibility**

1. Persons who are eligible for approval to travel at CIPHI's expense are those persons as listed above under definitions.
2. All NEC members are eligible for accommodation, travel and per diem expense reimbursement, regardless of their proximity to the meeting location, as per detailed in the Cost Sharing Formula, providing they are part of NEC business. This includes attending the Annual Education Conference (AEC) as a NEC member, where NEC meetings are held in conjunction with the AEC.

3. Where an opportunity exists for cost sharing with an employer of the individual, prior approval must be obtained from the National President and the CIPHI Office must then be informed.
4. Members of the EHFC may be included in the reimbursement & cost-sharing formula, at the discretion of the National President, for shared accommodation, travel and AEC registration in conjunction with attending meetings during the CIPHI National Education Conferences. Prior approval must be obtained from the National President before notifying CIPHI Office on the specific arrangements.
5. Claims for expenses while on CIPHI business other than NEC, BOC, CoPE or EHFC meetings and BOC exams, require the approvals of the National President prior to incurring the expenses. National President's expenses are to be authorized by the NEC. CIPHI Office will then be notified with such arrangements.

Cost Sharing

1. All eligible travel and business expenses named in this policy shall be paid in accordance with the CIPHI Cost Sharing Formula unless otherwise approved by the NEC prior to the meeting. A copy of the current cost sharing formula is available from the CIPHI Office.
2. All Branches that have representatives attending the NEC meetings will be billed a pro-rated portion (based on branch membership) of the meeting expenses as detailed in the CIPHI Cost Sharing Formula.
3. If a Branch sends an additional Branch representative, the Branch will be responsible for covering 100% of their expenses.
4. If there are expenses incurred by a Branch as a result of a cancellation, they will be cost-shared with National but not included in the cost-share formula for the meeting.

Miscellaneous Expenses

Miscellaneous business expenses for the National President may be approved by the NEC upon receipt of an expense claim form with receipts for business expenses over \$20.00 to a maximum of \$200.00 during CIPHI Education Conferences and to a maximum of \$100.00 at all other times. CIPHI Office will then be notified.

Transportation

1. Transportation arrangements are the responsibility of the individual and must be made via the most economical means available.
2. Persons who require airfare will be booked and paid for in advance by CIPHI with the services of the official CIPHI travel agency, Carson-Wagonlit Travel (CWT), out of London, ON. Approval in advance will be provided by the National President prior to contacting the CIPHI Office and CWT. CWT will only book travel for persons who have been confirmed eligible by the CIPHI office.

3. Air travel arrangements are to be made at least 30 days before the scheduled event to obtain the best possible competitive airfare.
4. Only economy air fares will be provided. If an individual chooses to upgrade to a premium fare class, they must submit a request and provide pre-payment.
5. Flight cancellation insurance will accompany air travel bookings.
6. Airline fees for one piece of personal luggage and any additional luggage necessary for CIPHI business will be reimbursed.
7. Persons wishing to use their personal automobiles or who wish to use an alternative form of transportation to air travel (e.g. Train, bus) may:
 - i. In the case of the use of an automobile, be compensated at the equivalent of the lowest available air fare (advance booked) or the actual mileage rate payable, whichever is lowest. A quote for the advance booking air fare must be submitted with mileage claims over \$300.
 - ii. In the case of an alternative mode of transportation, be compensated at the equivalent of the lowest possible available (advance booked) airfare or the actual rate charged by the carrier, whichever is lowest. A quote for the advanced booking air fare must be submitted with transportation claims over \$300.

Accommodation

1. Accommodation for NEC is authorized by the National President and can then be arranged by the CIPHI Office. The expenses will be paid as detailed in the Cost Sharing Formula.
2. Accommodation will be provided to allow for check-in the day prior to the event and check-out the morning following the final day of the event (s) to accommodate travel. Accommodation for local participants may be approved at the discretion of the President.
3. Accommodation expenses incurred by the member in excess of those nights pre-approved by the National President are the sole responsibility of the member.
4. It is the responsibility of the NEC, BOC, CoPE or EHFC Board members to notify the CIPHI Office in a timely manner of travel arrangements and dates so the appropriate accommodation arrangements can be made.
5. Where the members opt to stay with family or friends, they will be reimbursed at the rate of \$50 night if requested.

Expense Claim Submission

1. Travel expenses paid for by the Branches prior to the NEC meeting must be clearly detailed when submitting an expense claim. A copy of the receipt is required.
2. Expenses will be reimbursed to the amounts specified on the current CIPHI Expense Claim form.
3. No receipts are necessary for the following expenses:
 - Incidentals, such as phone calls, internet access during travel on CIPHI business.
 - Per diem meal expenses
 - Expenses less than \$15.00
4. Original receipts are required for travel and accommodation expenses in excess of \$15 such as hotel, bus, train, taxi, parking, ferries, and bridge tolls.
5. Airline and hotel receipts issued on-line may be e-mailed to the office provided they are the detailed official receipt.
6. Per diem meal expenses cannot be claimed when meals are provided regardless of whether the member chooses to partake in the meal being provided or not.
7. Expense claim forms are to be obtained from the CIPHI Office or National President and submitted within 30 days with all receipts following the meetings.
8. The expense claim summary page must be signed and dated. An electronic signature is acceptable, otherwise the form must be printed, signed and scanned to the office.
9. Other incidental expenses may be reimbursed at the discretion of the NEC.

Accountability

Expense claims are reviewed and approved by the CIPHI National Office in accordance with CIPHI expense and cost sharing policies. Anomalies are referred to the Chair NEC Finance and Audit Committee.

The National President, NEC Finance & Audit Chair, BOC/CoPE/EHFC Chairs will annually review and approve this policy, the Expense Claim Form and the CIPHI Cost Sharing Formula

Attachments / Appendices

Copies of current CIPHI expense claim forms and Cost Sharing Formula may be obtained from the CIPHI Office.

Document Change History

Initial Draft – June 2007

Approved – January 2011

Revised – March 2014

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