

Institute for Medical Research, Inc.	Travel Policy	No.	706
		Effective Date	4/14/09
		Revision Date	9/23/11
		Final Approval	Approved by IMR Board of Directors: 4/14/09

Purpose

To establish IMR's policy on travel.

Scope

All IMR administrative staff, research staff, and Investigators

Policy

Mission Statement: The Institute for Medical Research's mission is to further VA research and education. Relevant travel expenditures help accomplish IMR's mission. Accordingly, funds donated to and accepted by IMR may be used to reimburse travel expenses associated with furthering VA research and approved education activities.

Acceptable Travel: Travel to research meetings of clinical specialty societies, research societies, national and international general clinical groups (e.g., AMA, WHO) the primary goals of which are to further medical knowledge, research, public health and/or education is acceptable when the proposed travel has a demonstrable VA research relevance or is related to an approved staff or patient education activity.

ALL travelers must attach a copy of the program material (i.e., program announcement, agenda, acceptance letter if making a presentation) to the Request for Travel Funds.

For VA employees: A **government** passport is now required by VA employees traveling out of the country. Official Government Passport issuance requires 60 days. Instructions are detailed in the link below.

If you plan to use "authorized absence" to attend any meeting, you are responsible for submitting Form 10-0101B and any other required VA paperwork through appropriate VA channels for approval. Questions regarding required VA paperwork may be addressed to your Service travel coordinator. A copy of this completed form must be submitted to IMR with your travel request.

Utilizing IMR funding for travel and/or tuition is considered by the VA as utilizing "donated" money. Prior to requesting IMR travel/tuition funding, current VA requirements must be met and a copy of the approved VA forms must be submitted with the request for funding. Please see requirements at link, below.

Failure to provide approved copies of any required VA paperwork will result in non-payment of travel.

[S:\All Employees\Education\Travel and Tuition](#)

Please note:

- Persons traveling on IMR funds cannot use government rate airfares.
- All IMR paid travel will be at the basic coach rate.
- All expenses should be “reasonable” as determined by the city involved.
- Reimbursement for hotel will be limited to single rate occupancy.
- The traveler is responsible for excess costs and any additional expenses incurred for personal preference or convenience unnecessary or unjustified in the performance of official business.
- Reimbursement for gratuities (taxi, limo, etc.) will be limited to no more than 20%.
- One reasonable long distance phone call “home”, not to exceed 10 minutes, is allowed per day. Calls necessary to exigencies of business are allowed but require a statement to that effect.
- TAXI FARES: Once travelers arrive at their hotel, taxi cab fares will not ordinarily be reimbursed. All taxi fares claimed above must be justified separately and attached to this voucher. Reimbursement will be decided on a case-by-case basis

Approval Authority: Approval of proposed IMR travel funding requests will be the responsibility of IMR administrators, with the final authority for interpretation residing with the Executive Director. Exceptions to stated policy may be made only by the designated authority or the IMR Board of Directors. **Failure to provide approved copies of any required VA paperwork will result in non-payment of travel.**

Research and Education Relevance: It is the responsibility of the traveler to submit adequate documentation to justify a primary research purpose. If the travel is strictly for educational purposes, it must be documented as being work related instruction to improve performance of current duties; maintain or increase specialized proficiencies; or expand understanding of advances or changes in patient care, technology and health care administration.

Advance Payments: Travel advances will be limited to 80% of anticipated expenses. A travel advance may be requested by completing both the Travel Authorization & Travel Advance Forms.

Upon return from travel, all expenditures must be documented and unsubstantiated amounts must be returned. If the expenditures are not documented or if the excess amount is not returned, then these amounts will be considered taxable income and reported to the IRS as such.

Payment of conference registration fees may be requested in advance. IMR checks for such registrations may be made out to the organization sponsoring the meeting.

Receipts/Documentation: Original receipts are required for all expenditures of \$25 or more. Airline tickets (or e-tickets) and boarding passes are required for reimbursement for air fare.

Meals and Incidentals: In accordance with an IRS Accountable plan, meals and incidentals will be reimbursed at the prevailing federal per diem rate for the destination city. No receipts are required for meals and incidentals. Travel days will be reimbursed at 75% of the per diem rate.

Hotel Charges: Travelers will be reimbursed for reasonable hotel room costs as determined by the meeting site and prevailing hotel rates. The original itemized hotel bill must be submitted with the reimbursement request. Reimbursement may be made for reasonable laundry and dry cleaning costs if the hotel stay is five nights or more.

Transportation: Maximum transportation reimbursement shall be limited to the most reasonable method of travel, usually coach air fare. Use of private automobiles must be

approved in advance by the Executive Director. When authorized, reimbursement will be made at the prevailing federal mileage reimbursement rate plus applicable tolls. In no case will reimbursement for use of private automobile exceed the coach air fare to the location in question. Actual odometer readings or MapQuest (or equivalent) mileage estimates will be required for reimbursement.

Ground Transportation: Ground transportation will be reimbursed at cost based on submission of original receipts. Reimbursements are limited to travel to and from the city-of-departure airport/train station plus parking; from airport/train station to hotel, and hotel to airport/train station. A receipt is required for parking charges. Once the traveler has arrived at the hotel, taxi cabs will not ordinarily be reimbursed (to go out for dinner, etc.). Because meeting hotels are generally within walking distance or provide free shuttle service to the conference site, any other cab fares requested will require a separate justification attached to the traveler's reimbursement request. These taxi exceptions will be reviewed and approved by the Executive Director on a case-by-case basis.

Use of a rental car may be authorized, if approved in advance by the Executive Director with valid justification.

IMR Travel Reimbursement Request Instructions

Travel Authorization Request: All individuals requesting travel support must submit the **IMR Travel Authorization Request**. Approval of all travel requests hinges on an appropriate justification being provided. A copy of the program or conference announcement must be provided.

Advance Payment for Registration Fees: A request for advance payment for registration fees should be submitted by completing the Travel Authorization Request and Travel Advance Form. A copy of the completed portion of the conference announcement that specifies fees should be included.

VA Documentation: VA employees requesting IMR travel support must also complete VA **Form 10-0101B** *Request for Approval of Acceptance of Gifts or Donations for Travel/Subsistence Expenses in Connection with Official Travel by VHS&RA Facility Employees* through Part III and a *DVA Leave Request Form*.

Time Limit: Reimbursement for completed travel should be requested within 60 days. Requests submitted more than 60 days after the expense is incurred may be denied or may require additional justification and approval before reimbursement can be made.

Reimbursement Request: Travelers should complete and submit the **IMR Travel Reimbursement Form** with all required original receipts attached.

FINAL TRAVEL REPORT FORM

TO: Executive Director, IMR (151)

From: _____ Date: _____

For Travel To: _____

Travel Dates: _____

Expenses: **ORIGINAL receipts MUST be attached for airline ticket, hotel bill, registration fees, ground transportation in excess of \$25.00 and meals in excess of the amount indicated on the attached.**

Lodging: \$ _____

Meals \$ _____
 (Federal per diem M&IE rate for area of destination)

Transportation:
 Airline (**Attach airline ticket & boarding pass**) \$ _____

Automobile: _____ Miles x _____/mile \$ _____

Taxi: \$ _____

Parking: \$ _____

Rental Car: (**Attach receipt & justification**) \$ _____

Registration: (**Attach receipt/cancelled check**) \$ _____

Miscellaneous: \$ _____
 (If phone calls, indicate to whom call made & purpose) \$ _____

TOTAL EXPENSES \$ _____

Advances: \$ _____

TOTAL DUE IMR \$ _____

TOTAL DUE PAYEE \$ _____

I certify that reimbursement for the above travel expenses have not been claimed from any other source. I further certify that this travel is in correlation with my approved research project and will directly or indirectly support research.

VA employee? Yes or No

- If yes, If current salary exceeds \$141,000, indicate salary (for reporting purposes) _____
- If yes, I have attached a copy of required VA Forms **approved prior to travel.**
<S:\All Employees\Education\Travel and Tuition>

Signature of Claimant

Signature of Investigator

Traveler: _____ Is Traveler a VA employee? _____

Dates of travel: _____ Conference: _____

Agenda attached

**IMR REQUEST FOR TRAVEL ADVANCE
(Attach to Travel Authorization Form)**

Estimated Costs

Lodging Costs _____ x _____ (# of days) _____

Meals _____ x _____ (# of days) _____
Federal
M&IE rate for
area

Transportation
Taxi
Parking
or Rental Car _____

Miscellaneous
(indicate type of expense) _____

TOTAL ESTIMATED EXPENSES _____

x 80% _____

80% from Above _____

Airline Ticket
(100% may be advanced) _____

Registration
(100% may be advanced) _____

TOTAL ADVANCE _____

Approving Signature: _____ Charge to IMR Acct # _____