
TABLE OF CONTENTS

TABLE OF CONTENTS.....	1
Travel Policy Purpose and Enforcement	5
<i>Purpose</i>	5
<i>Responsibility</i>	5
<i>Enforcement</i>	5
Travel Authorization.....	6
<i>Travel Authorization</i>	6
Travel Arrangements	6
<i>Reservation Procedures</i>	6
<i>Electronic Ticket Instructions</i>	7
Domestic Air Travel	8
<i>Making Air Travel Reservations</i>	8
<i>Airline Class of Service</i>	8
<i>Upgrades for Domestic Air Travel</i>	8
<i>Lowest Airfare Definition</i>	8
<i>Discounted Airfares</i>	8
<i>Airline Frequent Flyer Programs</i>	9
<i>Lost or Excess Baggage</i>	9
<i>Denied Boarding Compensation</i>	10
<i>Overnight Delays</i>	10
<i>Cancellations</i>	10
<i>Unused Airline Tickets</i>	11
Lodging.....	11
<i>Hotel Selection Guidelines</i>	11
<i>Room Guarantee</i>	11
<i>Hotel Cancellation Procedures</i>	11
<i>Hotel Payment Procedures</i>	12
<i>Hotel Frequent Guest Programs</i>	12
Rental Car	12
<i>Rental Car Guidelines</i>	12
<i>Making Rental Car Reservations</i>	12
<i>Rental Car Categories</i>	13
<i>Rental Car Insurance – Domestic</i>	13
<i>Rental Car Cancellation Procedures</i>	13
<i>Returning Rental Cars</i>	13
<i>Rental Car Payment Procedures</i>	13
<i>Rental Car Accidents</i>	14
<i>Rental Car Club Memberships</i>	14

Other Transportation.....	14
<i>Personal Car Usage Guidelines</i>	14
<i>Reimbursement for Personal Car Usage</i>	14
<i>Ground Transportation To and From Terminals</i>	15
<i>Rail Travel</i>	15
<i>Class of Service - Rail Travel</i>	15
Personal/Vacation Travel.....	15
<i>Combining Personal with Business Travel</i>	16
<i>Miscellaneous Vacation Expenses</i>	16
<i>Personal/Vacation Travel Billing Procedures</i>	16
Telephone Usage.....	16
<i>Business Phone Calls</i>	16
<i>Personal Phone Calls While Traveling</i>	16
<i>Air-phone Usage</i>	16
<i>Rail-phone Usage</i>	17
<i>Hotel Telephone Usage</i>	17
<i>Rental Car Cellular Phone Usage</i>	17
Travel Insurance	17
<i>Travel Insurance Coverage</i>	17
<i>Additional Travel Insurance Purchased by Travelers</i>	17
Meals.....	17
<i>Personal Meal Expenses</i>	18
<i>Spending Guidelines</i>	18
<i>Spending Limits</i>	18
<i>Business Meal Expenses</i>	19
<i>Tipping for Meals</i>	19
<i>Payment for Meals</i>	19
<i>Documentation and IRS Requirements</i>	19
Expense Reporting.....	20
<i>Timing for Expense Report Completion and Submission</i>	20
<i>Approval/Authorization Process</i>	20
<i>Documentation Requirements</i>	20
<i>Acceptable Receipts</i>	21
<i>Unacceptable Receipts</i>	21
<i>Guidelines for Tips and Gratuities</i>	21
<i>Incorrect or Incomplete Expense Reports</i>	21
Travel Safety	21
<i>General Travel Safety Tips</i>	22
<i>Air Travel</i>	22
<i>Upon Arrival at your Destination</i>	22
<i>Hotel Fire Safety Tips</i>	23
<i>When staying at a hotel</i>	23

In case of fire or smoke.....23
If you must stay in your room to fight the fire... ..23

UPDATED 10/19/10

TRAVEL POLICY PURPOSE AND ENFORCEMENT

Purpose

This document provides guidelines and establishes procedures for individuals incurring business travel expenses on the organization's behalf.

Objectives:

- Ensure all travelers have a clear and consistent understanding of policies and procedures for business travel.
- Provide business travelers with a reasonable level of service, comfort, and safety at the lowest possible cost.

Responsibility

The traveler is responsible for complying with the travel policy. The approver is responsible for accurately reviewing expense reports for compliance.

The organization will reimburse travelers for all reasonable and necessary expenses while traveling on authorized organizational business.

The organization assumes no obligation to reimburse travelers for expenses that are not in compliance with this policy.

Enforcement

Travelers who do not comply with this travel policy may be subject to:

- Delay or withholding of reimbursement.
- Restricted privileges for violating this policy.

Who to Call on Travel Policy Issues

Any questions, concerns, and/or suggestions regarding this travel policy may be directed to:

Name: Sharon J. Tanner, EdD, RN
Chief Executive Officer
Phone: 404-975-5000
Email: sjtanner@nlac.org

TRAVEL AUTHORIZATION

Travel Authorization

All travel will be pre-approved by the organization prior to ticketing.

TRAVEL ARRANGEMENTS

Reservation Procedures

- Travelers should make reservations at least 6 weeks prior to trip.
- All air travel, car rental, and rail travel reservations including en route changes must be booked through the *American Express Intelligent Online Marketplace (AXIOM)*. **All travel must be booked through the online access.**

After you have received your user ID and password provided by the NLNAC Staff, you may begin using AXIOM.

To log on to the AXIOM site, follow the steps below:

1. Enter this URL into your Web browser: <https://nlactravel.axo20.com>
2. Enter the User ID and password provided by staff.
3. You will be prompted to enter profile information including contacts and preferences as well as a security pin that you will create for added security.
4. Press “Continue” once you have entered this information.

Complete Registration and Add Profile Information

All necessary profile information must be entered into the system prior to using AXIOM for booking.

Upon completion, you will have full access to the AXIOM tools. You may book your travel arrangements online 24/7. All travel arrangements must be made using the online access. If you experience any difficulties with booking travel, contact the NLNAC office.

Electronic Ticket Instructions

You will be flying on an electronic ticket; you will be sent an emailed confirmation by AXIOM. At the airport, you will need to provide the confirmation number to a ticketing agent or at a kiosk to obtain a boarding pass. Proper identification is required for all travel.

DOMESTIC AIR TRAVEL

Making Air Travel Reservations

All air travel reservations must be made through:

- American Express Intelligent Online Marketplace (AXIOM)
- Air travel reservations must **NOT** be made directly through the airlines.

Airline Class of Service

All domestic air travel must be coach class.

Travelers are expected to use the lowest logical airfare available. The travel program usually determines this based on certain parameters outlined in the “Lowest Airfare Definition” section of this policy.

Upgrades for Domestic Air Travel

- Upgrades at the expense of the organization are not permitted.
- Upgrades are allowed at the traveler’s personal expense. Upgrades must not be charged to the NLNAC.

Lowest Airfare Definition

Travelers are expected to book the lowest logical airfare as determined by the travel counselor based on the following parameters:

Routing:

- Routing requires no more than two stops each way of a round trip.
- Routing does not increase the one-way total elapsed trip time (origin to destination) by more than 2 hours.

Time Window:

- Departure/arrival must be no more than 3 hours before or after requested time.

Savings:

- Savings must be at least \$100 of the round-trip fare.

Discounted Airfares

The following types of low fare alternatives will be considered in determining the lowest logical airfare:

- Specially-negotiated fares
- Non-refundable fares
- Penalty fares
- Advance purchase fares
- Connecting and one-stop flights
- Off-peak flights
- Alternate airports

Airline Frequent Flyer Programs

Traveling individuals may retain frequent flyer program benefits. However, participation in these programs must not influence flight selection, which would result in incremental cost to the organization beyond the lowest available airfare as defined in this policy.

Lost or Excess Baggage

The ultimate responsibility for retrieving and compensating lost baggage lies with the airlines. The organization will not reimburse travelers for personal items lost while traveling on business. Measures that can be taken to minimize baggage losses include:

- Always carry valuables (e.g., jewelry, laptop computers, cameras) onboard the aircraft.
- Always carry important and/or confidential documents onboard the aircraft.
- Clearly tag luggage with name, address, and phone number.
- Retain baggage claim receipts for checked-in luggage.
- Purchase luggage insurance. (Costs vary and are the responsibility of the traveler.)

Follow these procedures if your bags are lost en route:

- Obtain a lost luggage report form from an airline representative in the baggage claim area.
- Itemize the contents of your bag including receipts wherever possible.
- Include a copy of your airline ticket and baggage claim stubs.
- Keep a copy of the report, airline ticket, and claim stubs.
- Inquire about reimbursement.

Travelers will be reimbursed for excess baggage charges only in the following circumstances:

- When traveling with heavy or bulky materials or equipment necessary for business.
- The excess baggage consists of organization records or property.

Denied Boarding Compensation

Airlines occasionally offer free tickets or cash allowances to compensate travelers for delays and inconveniences due to over booking, flight cancellations, changes of equipment, etc.

Travelers should not volunteer for denied boarding compensation when on organizational business.

Overnight Delays

Should an airline delay necessitate an overnight stay, the traveler must first attempt to secure complimentary or discounted lodging from the airline. If unsuccessful, the traveler should contact American Express Online Travel Specialists at 1-800-327-2737 for assistance. Please see Emergency Travel Assistance section for additional information.

Cancellations

When a trip is cancelled after the ticket has been issued, the traveler should inquire about using the same ticket for future travel.

Travelers can reuse airline tickets for the NLNAC business if airfare eligibility requirements are met.

It is the responsibility of the travelers to call AXIOM at 1-800-327-2737 to cancel the reservation.

Unused Airline Tickets

Unused airline tickets or flight coupons must never be discarded or destroyed as these documents may be required for rebooked travel.

Travelers with an electronic ticket must call American Express Online Travel Specialists to initiate a refund or credit for future travel.

LODGING

Hotel Selection Guidelines

Travelers are required to use:

- Properties in the **Moderate, Economy, Budget** categories.

Room Guarantee

Unless otherwise instructed, all rooms will be guaranteed for late arrival with the traveler's **personal charge/credit/debit card**.

Hotel Cancellation Procedures

Travelers are responsible for cancelling hotel rooms and must contact the hotel if the booking was made directly with the hotel.

Travelers will be held responsible and will not be reimbursed for “no-show” charges unless there is sufficient proof that the billing is in error.

Travelers should request and record the cancellation number in case of billing disputes.

Travelers should note that cancellation deadlines are based on the local time of the property.

Hotel Payment Procedures

Travelers are responsible for payment for all lodging expenses. Lodging should not be charged to the nursing program.

Hotel costs should be paid using a personal charge/credit/debit card.

Hotel Frequent Guest Programs

Many hotels have frequent guest programs that reward travelers with free accommodations in exchange for a given number of paid room nights at the hotel. Awards from such programs may be retained by travelers for personal use. However, participation in these programs must not influence hotel selection that would result in incremental cost beyond the organization's specially negotiated rate.

Any membership fees associated with joining these programs are not reimbursable.

RENTAL CAR

Rental Car Guidelines

Travelers may only rent a car to their destination if pre-approval is obtained, and driving is more cost-effective than airline or rail travel.

Reimbursements will not be made for rental cars that are not pre-approved prior to travel.

Making Rental Car Reservations

Rental car reservations must be made through:

- American Express Intelligent Online Marketplace (AXIOM)
- Rental car reservations must **NOT** be made directly through the rental car company.

Rental Car Categories

Travelers should book the following rental car categories:

- Economy
- Compact

When picking up a rental car, travelers should check with the rental car agent for any promotional rates, last-minute specials, or free upgrades. Travelers should utilize any discount programs they belong to.

At the time of rental, the car should be inspected and any damage found should be noted on the contract **before** the vehicle is accepted.

Rental Car Insurance – Domestic

The organization has made provisions for insuring rental cars against damage.

Rental car insurance is included in the organizational-negotiated rate.

Therefore, travelers must decline all insurance coverage except:

- Collision Damage Waiver (CDW)/Loss Damage Waiver (LDW)

All travelers and employees who will be driving must sign as a driver on the car rental agreement.

Rental Car Cancellation Procedures

Travelers are responsible for cancelling rental car reservations and must contact an American Express Online Travel Specialist via phone by calling 1-800-327-2737 or via AXIOM online. Travelers should request and record the cancellation number in case of billing disputes.

Returning Rental Cars

Every reasonable effort must be made to return the rental car:

- To the original rental city unless approved for a one-way rental
- Intact (i.e., no bumps, scratches, or mechanical failures)
- On time to avoid additional hourly charges
- With a full tank of gas or at the level at the time of pick-up

Rental Car Payment Procedures

Unless otherwise instructed, rental cars must be paid for with the traveler's credit/charge/debit card.

Rental Car Accidents

Should a rental car accident occur, travelers should immediately contact:

- the rental car company
- local authorities, as required
- the NLNAC office

Name: Joe G. Ortiz
Director of Business Operations and Information Systems
Phone: (404) 975-5002
Email: jortiz@nlnac.org

Rental Car Club Memberships

Travelers may participate in rental car club membership programs that are free of charge or at their own expense.

OTHER TRANSPORTATION

Personal Car Usage Guidelines

Travelers may use their personal car for business purposes only when pre-approval is obtained. Pre-approval can be obtained by contacting Dr. Sharon Tanner at the NLNAC office.

It is the personal responsibility of vehicle owners to carry adequate insurance coverage for their protection and for the protection of any passengers.

Reimbursement for Personal Car Usage

Travelers will be reimbursed for business usage of personal cars:

- On a fixed scale of \$.48 cents per mile.

NOTE: Total reimbursement for driving is limited to the cost of airfare if traveler was using AXIOM for booking.

Travelers will not be reimbursed for any repairs to their personal car even if these costs result from business travel.

To be reimbursed for use of their personal car for business, travelers must provide on their expense report:

- Purpose of the trip
- Date and location
- Receipts for tolls and parking

Gas charges are NOT reimbursable.

Ground Transportation To and From Terminals

For site visits, all ground transportation is the responsibility of the program being visited. The team chair should coordinate travel for the team with the nurse administrator.

The most economical mode of transportation should be used to and from airports, bus, and rail terminals. The following modes of transportation should be considered:

- buses, subways, taxis
- hotel and airport shuttle services
- personal car

Private limousines or car services may be used only when pre-approved.

Rail Travel

For rail and complex travel itineraries, call the American Express Online Travel Specialists at 1-800-327-2737.

Class of Service - Rail Travel

Domestic rail travel will be in coach class.

First class/reserved seating for domestic rail service may be utilized:

- When upgrade is at no extra cost
- At the traveler's expense

PERSONAL/VACATION TRAVEL

Combining Personal with Business Travel

Personal/vacation travel may be combined with business travel:

- Provided there is no additional cost to the organization.
- Only with pre-approval from the Chief Executive Officer.

Any additional costs incurred from extended bookings for airfare or lodging are the responsibility of the traveler and will not be reimbursed by the NLNAC.

Miscellaneous Vacation Expenses

The organization will NOT pay for vacation expenses such as sightseeing, bus tours, souvenirs, and personal expenses such as movies, health club fees, and meals.

Personal/Vacation Travel Billing Procedures

Personal/vacation travel billing must NOT be combined with business travel billing under any circumstances.

TELEPHONE USAGE

Business Phone Calls

Travelers will be reimbursed when using their personal telephone calling cards or home phone for business phone calls:

- Which are reasonable and necessary for conducting business.
- With an original copy of the bill attached to the expense report form.

Personal Phone Calls While Traveling

Travelers will NOT be reimbursed for any personal telephone calls made from:

- air-phones
- rail-phones
- cellular car phones
- hotels with telephone surcharges

Air-phone Usage

Travelers must NOT use air-phones due to the high cost.

Rail-phone Usage

Travelers must NOT use rail-phones due to the high cost.

Hotel Telephone Usage

When staying at a hotel, travelers should find out the property's local and long distance phone rates. Travelers should avoid making phone calls that have an added surcharge.

To avoid substantial charges added by hotels to telephone bills, travelers should:

- Use a charge/credit card, calling card, or call collect whenever possible.
- Travelers must use **1-866-747-9965** or **404-975-5000** when calling the NLNAC.

Rental Car Cellular Phone Usage

Travelers are NOT allowed to rent cellular car phones.

TRAVEL INSURANCE

Travel Insurance Coverage

In addition, full-time employees traveling on organizational business are covered by the following insurance policies at no cost to the traveler:

- Life insurance provided by the organization (if applicable)

Additional Travel Insurance Purchased by Travelers

The organization will NOT reimburse expenses for additional travel insurance coverage.

MEALS

Personal Meal Expenses

Personal meals are defined as meal expenses incurred by the traveler when dining alone on an out-of-town business trip.

Travelers will be reimbursed for personal meal expenses:

- According to actual and reasonable cost

Actual copies of detailed receipts must be submitted for reimbursement; credit card receipts are not acceptable for reimbursement.

Alcohol or alcoholic beverages will NOT be reimbursed for any traveler.

Spending Guidelines

Travelers will be reimbursed for actual and reasonable meal expenses accompanied by proper and original receipts up to the \$48.00 per day allowed expense for meals.

If individual meals are purchased, reimbursement will be limited to the following allowable expense for meals:

- Breakfast- \$9.00
- Lunch- \$13.00
- Dinner- \$26.00

If attending a meeting where meals are provided, the meal amount should be subtracted from the \$48.00 per day allowed expense for meals.

Spending Limits

Travelers will be reimbursed for actual documented meal expenses with proper and original receipts up to the maximum daily allowance.

Business Meal Expenses

Business meals are taken with clients or associates during which a specific business discussion takes place. This does not include site visits.

Travelers will be reimbursed for business meal expenses:

- According to actual and reasonable cost up to the maximum allowed

Tipping for Meals

Tips included on meal receipts will be reimbursed.

Tips should be no more than 15% of the bill.

Any tips considered excessive will not be reimbursed.

Payment for Meals

Whenever feasible, meal expenses should be paid for using the traveler's **personal credit/debit card**.

Documentation and IRS Requirements

An original receipt must be submitted with the expense report for any individual meal or expense.

In addition, for business meals, the following documentation is required by the IRS and must be recorded on the expense report:

- Names of individuals present, their titles, and company name
- Name and location of where the meal took place
- Exact amount and date of the expense
- Business purpose of the trip

EXPENSE REPORTING

Timing for Expense Report Completion and Submission

Travelers must file expense reports:

- No later than 10 days after completion of each trip
- Reimbursements filed after the 10 working day period may not be reimbursed by the organization.

Approval/Authorization Process

Each employee expense report will be reviewed for:

- Approval signatures
- Business purpose
- Supporting documentation and receipts
- Policy compliance

Documentation Requirements

Travelers must provide the following information in order to be reimbursed for expenditures:

- names of individuals present, their titles, and company name
- name and location of where the meal took place
- exact amount and date of the expense
- Business purpose of the trip

Travelers must submit the following documentation along with their expense report form:

- Air/Rail – original passenger coupon if issued itinerary from AXIOM
- Hotel – hotel folio plus charge/credit card receipt or other proof of payment
- Car Rental – rental car agreement plus charge/credit card receipt or other proof of payment
- Meals– detailed receipts for each meal

When a receipt is not available, a full explanation of the expense and the reason for the missing receipt is required.

Receipts must include the name of the vendor, location, date, and dollar amount.

Acceptable Receipts

The following receipts are acceptable:

- Original receipt completed by the vendor
- Original phone bill

Unacceptable Receipts

The following receipts are NOT acceptable:

- Photocopies, unless accompanied by a full explanation
- Credit card receipts for meals

Guidelines for Tips and Gratuities

Tipping a porter, bellman, or waiter should be based on the quality of service rendered. The organization will reimburse reasonable gratuities based on the following guidelines:

- Hotel bellman \$1.00 per bag
- Restaurant waiters 15 percent (15%)

Please check local customs for appropriate tipping when traveling abroad. Some hotels and restaurants include a gratuity, in which case a tip is not necessary unless the service has been exceptional.

Lavish or unreasonable gratuities will not be reimbursed.

Incorrect or Incomplete Expense Reports

Expense reports that are incorrect or incomplete:

- Will be returned to the approver for corrective action.
- May result in delay or non-reimbursement of specific items.
- Disregard for organizational policy or altering of receipts can result in disciplinary action or termination for employees.

TRAVEL SAFETY

General Travel Safety Tips

The following suggestions will provide a more safe and pleasurable trip for travelers:

Air Travel

- Plan to arrive at the airport in accordance with current recommendations by TSA or the airline.
- Do not leave luggage unattended or with someone you do not know.
- Never agree to carry anything on board or in your luggage for someone else.
- Put your name and address on your luggage. For added security, use tags that conceal your name and address.
- Remove all old destination tags to avoid misdirection by baggage handlers.
- Carry all medication, important business papers, and a change of clothing in carry-on luggage in case the checked luggage is misplaced.

Upon Arrival at your Destination

- Leave the airport as soon as possible after deplaning. Disturbances are more likely to occur in public airport lobbies.
- Beware of people claiming to be cab drivers in unmarked cars. Use licensed taxi or limousine services only.
- If renting a car, get maps in advance or from the rental car counter and clearly write out the directions from the airport to the hotel. Stop to ask for directions only in well-lit public areas. Keep the phone number of your destination with you.
- If unfamiliar with the local language, carry a card with the hotel's name and address. This can be shown to a cab driver or police officer should you become lost.
- In developing countries, try to reserve rooms on the third through the sixth floor of the hotel. Disturbances and burglaries are most likely to affect ground and second story levels. In some countries, fire rescue equipment does not reach above the sixth floor.
- Do not leave a sign on the hotel room door for maid service as it announces an empty room for would-be thieves.
- Be sure to carry your credit/charge card company's telephone number in case the card is lost or stolen. Always report losses immediately.

Hotel Fire Safety Tips

While major hotels are equipped with smoke alarms, sprinkler systems, and emergency evacuation instructions, fire safety awareness will increase a traveler's chance of survival in the unlikely event of a hotel fire.

When staying at a hotel...

- Check fire exits. Find the two nearest exits to your room and count the doorways so you can feel your way in the dark and smoke.
- Place your key on the nightstand and your shoes by the bed so you can find them easily.

In case of fire or smoke...

- Put on your shoes; grab your room key and head for the door. If there's any smoke in your room, get on your hands and knees and crawl. The fresh air you need to survive is near the floor.
- Feel the door and the knob. If they are cool, open the door and check the hall. If they are hot, do not open the door. Stay in your room and fight the fire.
- If the hallway is clear, close the door behind you and walk to the nearest exit. Never take an elevator in case of fire! Keep your room key with you in case the hallway becomes blocked and you need to return to your room.
- If the hall has smoke in it, close the door and crawl to the nearest exit. Stay against the wall so that you can count the doorways.
- When walking down the stairwell, hold the handrail to keep your balance.

If you must stay in your room to fight the fire...

- Open your window to vent smoke. If your window doesn't open, do not break it unless absolutely necessary. You may have to close it later if smoke is outside. Never jump from the third floor or above, chances are that you won't survive the fall.
- Call the desk to tell them you're in your room. Hang a sheet out the window to signal firemen.
- Fill the tub with water and turn on the bathroom vent fan.
- Wet some sheets or towels and stuff cracks of your door to keep out smoke. Use your ice bucket to bail water on the door. If the walls are hot, bail water on them. Keep everything wet.
- If there is a fire outside, get everything combustible away from the window.
- A wet towel tied around your nose and mouth is an effective filter if you fold it in a triangle and put the bottom corner in your mouth.
- Don't panic! Keep fighting the fire until rescue arrives.