

## ***Travel Conservation and Reimbursement***

<b>Reviewed Date</b>		<b>Number</b>	<i>FI0101</i>
<b>Revised Date</b>	<i>October 25, 2023</i>	<b>Approved Date</b>	<i>December 19, 1990</i>

### ***Introduction***

Business travel is a necessary part of the agency's work however the health unit has a responsibility to manage its travel costs (both reimbursement costs and staff time), minimize the hazard of motor vehicle collisions, and minimize greenhouse gas (carbon dioxide) emissions. These can be achieved by utilizing greener modes of transportation such as active transportation, carpooling, public transit and making use of alternatives to travel (e.g. virtual) wherever deemed to be feasible and appropriate. Meeting the mandate of the health unit to achieve optimum public health outcomes is the ultimate consideration, and thus for many program activities travel by single occupant motor vehicle remains the necessary means of program delivery.

### ***Purpose***

The purpose of this policy is to inform Simcoe Muskoka District Health Unit Board of Health members, employees students and volunteers, of the process for the calculation of the reimbursement rate and the procedures for submitting a travel claim. It is also to ensure the fulfillment of the mandate of the health unit by promoting the use of travel options or alternatives to travel that are safe, feasible, environmentally responsible and cost effective.

### ***Legislative Authority***

N/A

### ***Policy Definitions and Interpretation***

**Personal Vehicle:** A vehicle owned or accessed by the employee, student, volunteer for SMDHU business purposes that is not owned or leased by the Health Unit.

**Shared-Use Vehicles:** refers to the SMDHU vehicles which are specifically assigned for booking purposes.

**SMDHU Vehicles:** are vehicles owned or under a leased agreement with the owner named as the Simcoe Muskoka District Health unit.

### ***Policy***

It is recognized that in fulfilling SMDHU's mandate employees may be required to drive vehicles in order to do their job both effectively and efficiently where they have no other feasible alternatives.

Employees are expected where feasible, effective and appropriate to fulfill their work requirements to consider either telecommunication alternatives to travel, or means of travel based on the following objectives listed in order of importance:

- Safety (risk of injury to staff and others)
- The need for in-person service delivery or activity participation (versus the alternative of telecommunication means of delivery / participation)
- Efficient and cost effective delivery of service ( travel time and distance involved)
- Energy (gasoline) conservation
- Employee health promotion (opportunity for physical activity)
- Travel reimbursement for travel for health unit business shall be as follows: Total health unit business kilometers travelled per day of work less the kilometers of one (1) round trip back and forth per day to an employee's assigned SMDHU branch office or clinic from their home.

The Health Unit will reimburse Board of Health members, employees, students and volunteers for SMDHU business travel that is in accordance with the policy statement and procedures as outlined.

### ***Procedures (See Also HS0114 Motor Vehicle Incident Prevention Policy)***

#### **A. Travel Options**

1. When considering options the first priority consideration is if virtual methods exist that could be used rather than vehicle travel in order to address the requirement. Employees are to discuss with their direct supervisor the following:
  - The merits of in-person attendance versus virtual attendance;
  - The potential to request to partners that options be developed that allow for virtual attendance, and/or for meeting locations that allow for feasible public transportation accessibility.
2. When in-person attendance is deemed to be the most appropriate option for program delivery/activity attendance, the following will be considered by staff:
  - Determine if active (e.g. bicycle/walking) or public transportation may reasonably be utilized in the circumstances instead of vehicle travel. Staff and management need to consider the length of time involved to use active or public transportation as it may not be a reasonable or efficient use of either staff or Agency time.
  - **If not** then consider if carpooling could be reasonably utilized.
  - **If this is not reasonable** in the circumstances then single occupant vehicle use is an option.
  - As the Health Unit supplies vehicles for the sole purpose of employee business use, whenever employees require the use of a vehicle for health unit business, (whether carpooling or single use) employees are **required** to first book and use a health unit vehicle, if one is available unless accessing a health unit vehicle is counter to the objectives outlined in the policy (eg. someone driving into the office to pick up a vehicle only to retrace their route in order to deliver programs and as a result **significantly** increase their overall travel).

Combinations of the above options for any one journey may be employed in order to best meet the objectives. For example, a single trip may involve individual vehicle travel to a public transit location, followed by walking/riding etc.

## B. Travel Conservation Supports

Regardless of the means of travel chosen, employees are encouraged to organize their work in order to minimize avoidable travel and maximize the efficient completion of work-related tasks; this is particularly important for work being accomplished with single occupant vehicle use.

SMDHU may also provide supports to better allow employees to conduct their work based on the hierarchy of options (i.e. preference of telecommunication attendance when deemed appropriate, active and public transportation, and carpooling over single occupant vehicle use).

## C. Travel Claims Procedure

1. Employees, students and volunteers are responsible for the kilometers incurred traveling to and from the assigned office of employment and their home. Employees, students and volunteers who travel from home to their first worksite (not their assigned office) and/or from their last worksite (not their assigned office) to home may claim the distance traveled less the distance between their home and their assigned office. For travel outside the Simcoe Muskoka District Health Unit geographical area to conferences, workshops, etc., kilometers will be calculated from either your home or assigned office, whichever is closer to the conference and return.
2. Employees delivering Health Unit materials from one office to another office or location will not be reimbursed for travel mileage if they are delivering materials on their way home. Notwithstanding, employees may be reimbursed for their time spent traveling **provided they have prior preapproval from their immediate supervisor** to volunteer to deliver such material.
3. Travel required by employees, students and volunteers in conjunction with a conference or meeting under the professional development policy must be submitted for review and approval by their supervisor both before and after events occurring within the health unit and outside of it.
4. For travel required for emergency call-out, kilometers will be claimed from home and return.
5. Travel is not claimable for attendance at health unit social events. Health Unit education-based events including All Staff or Department In-Services are not deemed social events.
6. Employees may claim mileage for the use of their Personal Vehicles while on health unit business based on the Revenue Canada Reasonable non-taxable rate formula as amended periodically less three cents/km.
7. The number of claimable kilometers driven on a daily basis is recorded as per the [Expense Claim Submission User Guide](#) MySparkrock & Dynamics 365 (February 16, 2022) ). Claims can be made for mileage, as well as parking fees, bus costs, train and/or subway receipts. Where receipts are not available for parking fees, the employee/ nonemployee may still claim the expense. Reimbursement for use of toll highways **will only be provided if pre-approved by the direct supervisor in advance**.
8. All mileage claims are to be submitted monthly. Notwithstanding, to accommodate employee vacation and absences, claims must be submitted either within the month they were incurred or the month following. **Expenses submitted beyond the above period(s) may not be reimbursed.**

9. Board of Health members, employees, students and volunteers will be reimbursed for approved travel expenses through payroll (via direct deposit unless indicated differently) on the pay period after approvals for the expenses have been received.

### **Form T2200**

For income tax purposes, staff may submit a Form T2200 to Finance for completion.

### **Other Travel Expenses**

Refer to FR0101Expense Report Policy and HR0803 Out of Province and Out of Country Travel

#### **Examples:**

- a) An employee who lives in Midland and whose assigned office is Barrie (travel distance 50 kms one way) travels to and returns home from the Gravenhurst office (travel distance 80 kms one way) without first going to the Barrie office. The employee would claim the total kilometers travelled (160 km round trip) **less the kilometers of round trip back and forth to the Barrie office (100 kms round trip) with total claim equals  $160 - 100 = 60$  kms.**
- b) An employee who lives in Midland and whose assigned office is Barrie(50 km one way) travels to the Midland office from home (5 kms) without first going to the Barrie office. The employee would claim the distance from home to the Midland office ( $5 - 50 = -45$ km) less the distance from home to the Barrie office (50km's) which **in this scenario there is no mileage claim.**
- c) An employee on an approved Work from Home (WFH) arrangement who lives in Midland and whose assigned office is Barrie (50 km one way) when required to work in Barrie on a WFH day would not be entitled to a mileage claim from their home to their assigned SMDHU office. Similarly, if on a WFH day they are required to leave home to work in the community the employee would claim the distance from their home to the community work location and back home (total kilometers for the day) **less the distance from their home to their assigned office in Barrie and from the Barrie office back to their home, which may or may not result in a claim for mileage.**

### ***Related Forms***

### ***Related Policies***

HR0803 Out of Province and Out of Country Travel

### ***Review/Revision History***

Review/Revision History:

Revised: May 14, 2008

Revised: January 1, 2005

Revised: December 10, 2003

September 2010 Policy Number Change - Previous Number B4.090

Revised March 2014: Travel Conservation and Reimbursement incorporated  
Revised Feb 13, 2019 Clarifications  
October 25, 2023, One round trip added and expense claim process updated

***Final Approval Signature:*** \_\_\_\_\_

***Appendix A - Standard Travel Distances***

**Return Trip totals 15 Sperling Drive, Barrie to:**

Barrie Clinic	10 km
Cookstown	65km
Orillia	73km
Collingwood	106km
Midland	100km
Gravenhurst	150km
Huntsville	260km