

Travel Conservation and Reimbursement

Reviewed Date		Number	<i>FI0101</i>
Revised Date	<i>February 13, 2019</i>	Approved Date	<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. teleconferencing, web meetings) 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

Approved Drivers: are individuals who meet and comply with the requirements outlined in the policy.

Contractor: defines an individual contracted to conduct health unit business in the community.

Personal Vehicle: A vehicle owned or accessed by the employee, student, volunteer or contractor 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.

Supervisor: refers to the position to which the employee directly reports

Policy

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

Board of Health members, employees, students and volunteers 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)

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 telecommunication methods exist (such as teleconference, videoconference, webinar, or webcast) that could be used rather than vehicle travel in order to address the requirement. Employees, students and volunteers are to discuss with their direct supervisor the following:
 - The merits of in-person attendance versus telecommunication attendance;
 - The potential to request to partners that options be developed that allow for telecommunication 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 staff business use, whenever staff require the use of a vehicle for health unit business, (whether carpooling or single use) staff 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, Board of Health members, employees, students and volunteers 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 Board of Health members, employees, students and volunteers 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 home office, whichever is closer to the conference and return.
2. Employees, students and volunteers 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, students and volunteers 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. A consideration of the travel options outlined earlier in this policy is expected to be done for conference and meeting attendances.
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.
6. Board of Health members, employees, students and volunteers 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 six cents/km.
7. The number of claimable kilometers driven on a daily basis is recorded on the Travel Reimbursement Form FI010 (F1). Employees, students and volunteers will include

the destination as well as any parking fees, bus, train and/or subway receipts. Where receipts are not available for parking fees, the employee/ non employee may still claim the expense.

8. At the end of the month, Board of Health members, employees, students and volunteers must total the kilometers claimed and any other expenses and sign and submit the form to their Administrative Coordinator no later than the fourth of the month who will then forward for Managerial approval.
9. The Administrative Coordinator will forward the authorized form to Finance Administrators, no later than the sixth of the following month. Note: When the sixth falls on a day the health unit is closed (Saturday, Sunday or Statutory holiday), the authorized form is due on the business day preceding the office closure.
10. The Financial Administrators will forward the Board of Health members, employees, students and volunteers name and the amount of travel reimbursement owing to payroll by no later than the Wednesday of the week preceding the week of the second pay of the month.
11. Board of Health members, employees, students and volunteers will be reimbursed for approved travel expenses through payroll on the second pay period of the month or by cheque.
12. Travel Reimbursement Forms received by the Finance Administrators after the due date will be processed with the following month's claims.

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) travels to Gravenhurst from home (travel distance 80 kms) without first going to the Barrie office. The employee would claim the distance from home to Gravenhurst less than the distance from home to the Barrie office ($80 - 50 = 30$ kms) which in this scenario the claim is 30 kms.
- b) An employee who lives in Midland and whose assigned office is Barrie travels to Midland from home (5 kms) without first going to the Barrie office. The employee would claim the distance from home to the Midland office ($5 - 80 = -75$ km) less the distance from home to the Barrie office which in this scenario there is no claim.
- c) An employee in a formal Work from Home (WFH) arrangement who lives in Midland and whose assigned office is Barrie when required to work in Barrie on a WFH day would not be entitled to a mileage claim from their home to their home 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 less the distance from their home to their home office in Barrie, which may or may not result in a claim for mileage.

Related Forms

FR0101 (F1) Travel Reimbursement

Related Policies

OP0108 Innovative Office

HR0803 Out of Province and Out of Country Travel

FR0104 Expense Report

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

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