



EXPENSE AND REIMBURSEMENT POLICY- FINANCE COMMITTEE

Draft Date:

January 10th 2015

Accountability: Sickle Cell Disease Association of Canada

Responsibility: President/Executive Director

Approver: Sickle Cell Disease Association of Canada-Management

Approval date: March 26th 2015

Revisions:

Current Revision: March 3rd 2017

Review: Annually/As necessary

Reimbursement is an act of compensating someone for an expense incurred while performing duties on behalf of a person or an organization.

GENERAL INSTRUCTIONS AND PROCESS FOR REIMBURSEMENT

- Report for all expenses must be completed in ink or electronically on the appropriate SCDAC/AAFC
- Expenses submitted for reimbursements which is outside the parameters of SCDAC/AAFC will only be approved after the claim is reviewed by management (i.e Finance committee)
- Original receipts must be attached to the SCDAC/AAFC expense form. In the event an original receipt not available, the expense may be delayed or not approved. Management / Finance Committee will review the circumstance regarding such claim.
- If a claimant chooses he/she can donate an expense claimed back to SCADC/AAFC.
- If unclear about SCDAC/AAFC covering an expense, kindly verify with management before incurring such expense. While this guideline provides general coverable expenses; SCDAC/AAFC's coverage may be event/circumstance dependent and as such will cover expenses communicated to each volunteer/participant



PROCEDURE FOR SUBMITTING A CLAIM

- Claimant must submit completed expense form with all original receipts to SCDAC/AAFC ,and the reimbursement process is as follows:
- Submit a completed expense form with original receipts to SCDAC /AAFC via snail mail or in person (an electronic copy of the completed expense form can be accepted, however reimbursement will be subject to the submission of the original receipts.
- If the expenses submitted are approved, SCDAC/AAFC management / Finance Committee will reimburse claimant the expenses submitted by check by person or by mail.
- If the expenses claimed were not approved for any reason the claimant must be notified. The claimant has the right to appeal the decision.

APPEALING THE DECISION OF UNPAID EXPENSES

If Management/Finance Committee, for any reason decides not to pay part or total amount of claim, the claimant must be notified. The claimant has the right to appeal the decision by sending an appeal letter to Management / Finance committee. The Management /Finance committee will make final decision on the acceptance or rejection of the claim.

ACTIVITIES FOR WHICH EXPENSE REIMBURSEMENT INDICATED

1. SCDAC/AAFC Meetings and Conferences:

- Members of the Board of Directors, Management and Volunteers who attend SCDAC /AAFC meetings and conferences must first be approved by SCDAC/AAFC to attend such meetings or conferences. Individuals who are approved to attend conferences on behalf of SCDAC/AAFC are expected to attend all sessions of the meetings or conferences and be prepared to submit a written report to the Organization. SCDAC /AAFC will reimburse registration fees, travel, accommodation and meal costs as applicable after submission all original receipts.
- No costs or expenses will be covered for alcohol or entertainment such as movies and mini bars. Internet and phone calls will only be reimbursed if used for SCDAC/AAFC activities.
- SCDAC/AAFC in some cases may pay directly registration fees ,travel, accommodations, in which case no reimbursements will be required other than expenses for meals



2. *Volunteer and Professional Development:*

- SCDAC/AAFC may send its Board of Directors, Management and or volunteers to courses or seminars for trainings and professional development. The individual must obtain approval from Management/Finance Committee prior to attending courses and seminars. Items for reimbursements falls under the same criteria as mentioned above.

3. *Committee of the Board:*

- Expenditure incurred by standing committees, or ad hoc committees of the SCDAC/AAFC must be in accordance with the established budget for same. No travel will be reimbursed without prior approval by the Management/Finance Committee.

4. *Telephone Facsimile, E-mail or Internet Expenses:*

- There is no provision for the reimbursement for an individual's personal telephone, faxes, e-mail and Internet charges. Only charges with applicable taxes directly related to the business of SCDAC/AAFC will be reimbursed. All receipts must be submitted as per the reimbursement standards and policies.

5. *Travel*

- All travel by air, train, coach, or ferry, must be approved in advance by the Management/Finance Committee before travel arrangements are made and booked at a minimum of 4 weeks prior to travel to ensure best rates possible. The cheapest possible rates must be explored before travel is booked. Air travel must be in economy class on all aircraft chosen. No travel or medical insurance or other travel expenses will be paid by SCDAC/AAFC except where otherwise agreed upon. For road travel, mileage must be reimbursed at the rate for each province or territory where travel took place. Calculated mileage is 0.55cents/km.
- All cost for parking, public transit and taxi fares , including reasonable gratuities where applicable will be reimbursed



6. Accommodation

- Where rooms have been blocked at a hotel where a SCDAC /AAFC event is being held, and a special rate has been provided by the Hotel the organization will reimburse all approved participants accommodation cost using the special rate ,except where a prior consent was given to the contrary.
- SCDAC/AAFC will not reimburse for accommodation expenses at another hotel unless special permission has been granted.
- In other instances, SCDAC/AAFC will reimburse for moderate hotel rates (e.g. in the \$175-\$210 /night range) in major cities when travelling on SCDAC /AAFC's business and any exception to this should be submitted for approval prior to booking.
- While SCDAC/AAFC appreciates any effort made by the claimant to reduce costs by sharing accommodations, it realizes that individual needs may dictate otherwise.

7. Meals

- Cost of meals while on the business of SCDAC/AAFC should be minimized, however may reimbursed up to \$100/day/person:

- ✓ Breakfast \$20
- ✓ Lunch \$30
- ✓ Dinner \$50

Original receipts must be provided with each expense sheet.

- 8. *Other expenses and meals for others who may accompany the individual.* There has to be a prior approval by the Management/Finance Committee or the expense will not be covered by the organization.

Contact Information:

SCDAC/AAFC Management/Finance Committee

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