

# Travel Policy



## 1. **POLICY**

- To ensure that all employees have been competently trained and have easy access to the policies and procedures that are associated with safe, prudent and reasonable travel practices.

## 2. **PURPOSE**

- The purposes of this policy are to:
- explain which expenses will be reimbursed and how; and
- give instructions to employees to track their expenses when travelling and submit receipts on a timely basis.

## 3. **SCOPE**

- This policy is applicable to employees as follows:
- at the request of management, to travel on company business to a different city than the one the employee lives; and
- any car, train or bus trip that lasts longer than an hour
- Exclusion
- This policy does not refer to traveling to and from the office on a daily basis for work.

## 4. **RESPONSIBILITY**

- XYZ Co. will reimburse transportation accommodations and per diem expenses **[subject to the provisions of this policy]**, for employees who travel for company purposes. This includes the following:
- Meet with clients or partners.
- Attend events, like conferences, where you'll represent our company.
- Visit our company's offices in order locations
- Conduct research or give talks/ lectures/ presentations, attend seminars on behalf of XYZ Co.
- **Legal/ Medical Expenses**
- Excluding expenses for issuing passports, XYZ Co. will pay all relevant expenses

if there is business travel that require a visa or other documentation to gain entry to their countries.

- Medical resource, vaccination or examination costs will be paid directly by XYZ Co.
- If workers compensation insurance does not cover travel-related accidents, XYZ Co. may partially or fully reimburse employees for medical expenses.

### • **03 Transportation Expenses**

- XYZ Co. will pay employee expenses for company travel business as follows;
- a company-paid plane ticket in premium economy class;
- a business class ticket for executive;
- a premium seat ticket if required to travel by other means such as trains, boat or coach;
- reimburse two-way tickets, meals (as included in the ticket price) and one the luggage, plus a carry-on in case of a plane trip. (additional expenses, like luggage or purchase of duty-free items are not reimbursed; and
- reimburse all gas and toll fees if an employee plans to travel by car.

### • **Local Transportation**

- XYZ will reimburse fares for traveling by taxis on business purposes as follows:
- From airport/stations to hotel and back.
- To and from every place traveled for company purposes such as conference, venues, client offices or client lunches.
- Transportation expenses for trips to museums, concerts or other places for personal purposes will not be reimbursed.
- XYZ Co. will reimburse rental car expenses paid by employees for a compact, two or four door automatic transmission, petrol-fueled vehicle provided with:
- The employee has a valid driver's license; and
- Safe travel procedures and policies have been established and effectively communicated and shared with employees.

### • **Accommodation**

- When travelling on a company business the following is applicable:
- the office manager/HR generalist/ finance manager will look a room and pay for it at a **[3-star hotel]** or, the best hotel in the area;
- if an employee plans to stay longer for personal reasons. All additional costs will be the responsibility of the employee; and
- any extra-room-related charges included, will not be reimbursed. Subject to exceptions if an upgrade is necessary for reasons outside the control of the employee(ie) a malfunction that makes the room unsuitable and there is no room of equal cost available.

### • **Business Trip Expenses**

- XYZ Co. will reimburse employees during business trips for the following expenses:
- reimbursement for lunch or dinner at a maximum of 20.00 per meal;
- reimburse the whole bill including trips for dinners when meetings are hold with clients.
- If the one meal exceeds **[150.00]** per person, approval must be given by the **[CFO]**.

### • **Manager/Supervisor Responsibilities:**

- The manager/supervisor must ensure that:
- safe travel procedures and policies are written, communicated and followed.
- be vigilant in determining if an employee has a driver's license, and, if so determined an employee does not have a valid driver's license, to inform the employee that he or she cannot drive in company business.
- a communication travel plan is in place and is being followed in all respects.
- Employees will be reimbursed for reasonable expenses in \_\_\_\_\_ if an employee is stranded overnight in a location away from his or her home.
- Adequate time is allotted for an employee to travel to his or her destination

safety and securely.

- **Employee Responsibilities**

- Employees must ensure that:
  - They are trained in and follow the safe work procedures
  - They participate in any training provided by their manager/supervisor related to safe driving
  - They wear their seatbelt when the motor vehicle is in use
  - They discuss with their manager/supervisor if personal vehicle is not available and this affects the worker's ability to meet their job expectation.
  - They report to their manager/supervisor any incidents or accidents that occur while on business travel.
- Follow the rules of the road.
- They pay for any fines received for traffic violations
- They cancel or reschedule activity if it is unsafe to drive either due to road or weather conditions or worker personal status (i.e. medical, physical, cognitive or psychological status)
- Refrain from handheld cell use while operating a vehicle
- That in cases of severe weather, alternate arrangements are made to attend or to cancel this meeting. NO HIGHWAY TRAVEL IS REQUIRED WHEN HIGHWAYS ARE CLOSED, MAY BE CLOSED OR TRAVEL IS NOT RECOMMENDED.

## 5. DEFINITIONS

- "Travel" means a business trip to a different city than the one the employee lives; and "travel" means any car, train or bus trip that lasts longer than one hour.

## 6. REFERENCES AND RELATED STATEMENTS OF POLICY AND PROCEDURE

- Occupational Health and Safety
- Legislation (OHS)
- Employment Standards acts
- T.A.

## 7. PROCEDURE

- **[Employees]** need to:
  - Always ask for receipts when incurring costs company business;
  - always facilitate with the office manager / HR generalist / finance manager etc. when there is a situation or problem that arises in the course of performing company business;
  - use best judgement when traveling for company purposes by not being excessive when spending on food and drinks.
  - keep receipts in an organized fashion;
  - when back from your trip, submit all expenses within [two months]. If you had a reason not to submit expenses within that period, talk to your manager. They'll be the ones to approve your expenses for reimbursement. You'll receive the money with your next paycheck after your manager approves.
- Traveling with a NON-Employee
- Company policy allows an employee to share a company booked room with a friend, partner or family member provided it does not incur extra charges for the company.

- Employees will be financially responsible for any expenses or damages a non-employee incurs.
- There will be no reimbursement of any expenses incurred by a non-employee for the entirety of the business trip.
- Transportation Protocol
- Employee travel for business purposes must be booked at least **[two weeks]** in advance unless in emergency business situation arises. The procedure is as follows:
- Liaise with office manager/ HR generalist/ finance manager who will book the ticket directly.
- Approval of the manager must be obtained in writing.
- Depending on the purpose of the trip, manager and booking partner will collaborate with the employee on the appropriate transportation and convenient times.
- The employee may want to book the transportation on his or her own account in order (ie) to collect bonus miles on a credit card but this must first be discussed and approved by the manager.
- In the event that the employee plans to travel by car and same is approved, all gas and toll fees will be reimbursed. A maximum of 100.00 for expenses during the trip for food, non-alcoholic drinks and other necessities will be allotted.
- Non-Compliance/Breach

#### **Non-Compliance/Breach:**

Non-compliance with this policy will result in a review of the incident. A review for non-compliance may result in disciplinary action, up to and including termination of employment or privileges: fines and / or prosecution of individuals under OHS Regulations and applicable Federal and Provincial legislation

#### **8. ATTACHMENTS**

None.