



POLICY

MEMBER AND EMPLOYEE CLAIMS

Adopted by Executive Council: October 3, 2022

Reviewed by Advisory Committee: September 21, 2022

POLICY:

Members and employees of the Union will be reimbursed for reasonable expenses incurred while on authorized union business, provided that such expenses are appropriate for the Union, necessary, reasonable, and supported by receipts as required by this Executive Administrative Policy.

The responsibility to observe this expense claim policy rests with either the member or employee submitting a claim and the union officers providing approval. The guiding principle behind this expense policy is that of 'no loss, no gain'; that is, the member or employee submitting a claim under this policy should neither gain nor lose by accessing the policy.

SUBMITTING CLAIMS:

1. Expense claims should be submitted on MoveUP Standard Expense Claim form, which can be obtained from the Union office or from the MoveUP website. Union councillors and stewards may be approached by members for assistance in obtaining forms.

All claims should be submitted to the Union's Secretary-Treasurer, either electronically or in hard copy.

If you are submitting your expense electronically, email them directly to the accounts payable clerk at ap@moveuptogether.ca. If you are submitting them by mail, send them to the attention of Accounts Payable. If you are submitting them while at a union meeting, hand the form to the meeting chair.

Claims should be submitted within 30 days of the day the expenses were incurred. If claims are not submitted within 120 days of being incurred, they may not be paid.

2. All claims must describe the union activity or event, in as much detail as possible, for which the expenditures were incurred. Details of courses completed at the Union's expense should be provided. If this information is not provided, it may delay the processing of your claim.
3. Only original expense claims and original receipts should be submitted for payment. The member, or employee, should retain a copy of their claim.

APPROVAL OF CLAIMS:

Nothing contained in this policy supercedes the MoveUP Constitution or By-Laws.

1. Claims should be supported with original receipts. Claims without receipts may be denied.
2. Claims will be approved for payment by the Secretary-Treasurer. Vice-Presidents act on behalf of the Secretary-Treasurer in their absence. The President will approve the Secretary-Treasurer's expenses.
3. Union officers shall not approve their own expense claims.
4. Prior to members and employees incurring travel or other personal expenses on behalf of the union in excess of \$100, a union Table Officer must approve in writing the expenses to be incurred. If prior approval is not given, the expenses may not be reimbursed. If required, a "Leave of Absence" request should be completed at the same time. Approval to travel will be provided when it has been demonstrated that reasonable and economical travel and accommodation arrangements have been planned. The Union will make all travel and accommodation arrangements for members and employees.
5. Members who regularly travel to & from Executive Board and/or Executive Council meetings do not need approval to travel for each and every meeting. Such members will need approval for the initial travel arrangements, and shall thereafter have a standing authorization for attending those meetings until they resign their office. However, should they wish to alter their travel or accommodation arrangements, then they must have that approved prior to the travel taking place.

DOCUMENTATION:

1. Expense claims should be submitted on a MoveUP standard expense claim form. Completed forms must be signed by the member or employee submitting the claim, and by all approvers.
2. Original receipts should be attached for all items claimed (except unreceipted per diem and mileage allowance). Claims without receipts may be denied. Scanned copies of receipts are acceptable if the claim is being submitted electronically.
3. Claims for entertainment expenses, or expenses paid for others, should list the names and/or organizations of the individuals entertained or being claimed for. Such claims should also include the original bill detailing each item included in the total amount being claimed (e.g., restaurant bills listing all food and drinks that were paid for).
4. Kilometer charges must state the origin and destination points for each trip. A member should also include how many kilometers they would normally drive to and from work on the date of the expense. If the member drives another member, then they must include the full name of that member on their expense form.
5. Claims totalling \$100 or more submitted by members who are not Table Officers or Union employees should be accompanied by a copy of the written approval given by a Table Officer.
6. Hotel expense claims must include the original hotel bill. Non-reimbursable items, e.g., movies, etc., charged to a hotel bill should be identified on the hotel bill and excluded from the expense claim.

UNION CREDIT CARDS:

1. Expense claims should be submitted and approved for all items charged to a Union credit card. Each item charged should be listed on an expense claim form. Adequate documentation and the appropriate receipts must be attached.
2. Use of a Union credit card does not exempt the user from any of the documentation or approval requirements, or other responsibilities under this policy. Union credit cards are to be used only for union business.
3. Cash advances are not permitted on Union credit cards.

MEALS WHILE ON UNION BUSINESS:

***These changes are effective January 1, 2023**

1. Only the cost of meals purchased while traveling or working for the union will be reimbursed. For members who reside in the Metro Vancouver area and are booked off for more than one week and are headquartered at the Union office, meal costs will normally only be reimbursed if you are away from the office on union business during the regular mealtime.
2. Union members and employees to be reimbursed for the reasonable cost of meals have two options for reimbursement:

- a. They may claim the appropriate Fixed Meal Allowance

Breakfast:	<u>\$20.00*</u>
Lunch:	20.00
Dinner:	<u>50.00*</u>

OR

- b. They may claim a reasonable amount with receipts (including gratuities). Such receipts should include the detailed listing of food and drink ordered, or else they may not be reimbursed. If you paid for another member’s meal, include the full name of that member on your expense claim.
3. For members and employees away from home, i.e., requiring accommodation, within Canada, a \$100* per diem will be allowed for meals and incidental expenses, which excludes accommodation and travel expenses. However, when a meal has been provided the “Fixed Meal Allowance” for that meal should be deducted from the total per diem claimed for that day.

For such travel within the United States of America, \$125* US per diem will be allowed for meals and incidental expenses, which excludes accommodation and travel expenses. The per diem will be paid at the prevailing exchange rate.

For international travel (i.e., outside of either Canada or the United States of America), \$125* Cdn. per diem will be allowed for meals and incidental expenses, which excludes accommodation and travel expenses.

Receipts for meal costs greater than the per diem rates will be reimbursed at the discretion of the Secretary-Treasurer or designate.

Receipts for alcoholic beverages normally will not be reimbursed, except for Union hosted occasions, or when the Secretary-Treasurer deems it appropriate.

ACCOMMODATION:

1. Subject to the Air Travel Policy and approval of a Table Officer, overnight accommodation may be made available prior to a union meeting when the following conditions are met:
 - (a) The Union meeting is scheduled for a full day with a start time of 9:30 am local time or earlier;
 - (b) The usual, regular and most appropriate method of travel requires that the attendee leave their primary residence at least three (3.0) hours prior to the start time of said meeting; and
 - (c) The attendee can provide evidence deemed acceptable by a Table Officer that the usual, regular and most appropriate method of travel requires that the attendee leave their primary residence at least three (3.0) hours prior to the start time of said meeting.
2. Subject to all of the above, a "Hosting Allowance" of \$50 per night will be allowed for members who stay with relatives or friends in lieu of hotel accommodation.

USE OF PERSONAL VEHICLES:

1. When members use their personal vehicle for transportation to and from a union function or for union business, vehicle-operating costs ("mileage") will be reimbursed at the prevailing Canada Revenue Agency (CRA) approved rate in use at the time of the vehicle use. This operating cost will be reviewed annually in January by the Secretary-Treasurer, and any change will be incorporated into the policy and related documents.
2. Vehicle kilometer allowances will be provided for travel in personal vehicles when the kilometers claimed on any specific day are in excess of the kilometers traveled by the claimant that day in a personal vehicle to and from their normal place of work.
3. Members planning to use their vehicle to travel long distance, which would create mileage claim more than \$100.00, must have such travel expenses approved by a Table Officer before they commence their trip.
4. Travel violation tickets, such as speeding tickets, will not be reimbursed, nor will parking tickets.
5. The Union will reimburse the deductible portion of any insurance claim (collision or comprehensive) submitted to a union certified insurance company, arising while the member is using his/her personal vehicle for union business, providing such reimbursement is not available from any other source. Such reimbursement will be to a maximum of \$500, or the deductible amount, whichever is lower.

AIR TRAVEL:

All air travel arrangements will be made and paid for by the union office. Members and employees are encouraged to book air travel as early as possible to take advantage of any discounted airfares.

Airfare from the Fraser Valley to the Lower Mainland will not be arranged.

Normal travel to and from Vancouver Island, any Gulf Island, or the Sunshine Coast will be by ferry. Any request for a flight instead must be approved by a Table Officer.

KILOMETER ALLOWANCE IN LIEU OF AIR FARE:

1. When air travel is available and appropriate and the member chooses to travel by private vehicle, the member may claim a vehicle kilometer allowance. The total vehicle kilometer allowance claim must be limited to the lesser of (1) the actual mileage plus appropriate ancillary costs e.g. tolls, ferries, parking or (2) the lowest equivalent airfare available on the predominant carrier.

For this comparison, associated travel expenses, e.g. transportation costs to and from airports, parking fees, etc., should be incorporated into the “lowest equivalent available air fare” amount. The kilometer allowance should be calculated from the member’s point of origin to the destination.

Approval by a Table Officer must be obtained before a kilometer allowance in lieu of airfare is claimed.

2. Should a member wish to drive instead of fly, the determination of “lowest equivalent available air fare” must be made by the Union when such approval is granted. The determination of lowest equivalent available air fare should consider any air fare discounts which could have been obtained by a unionized air carrier if the air travel arrangements were booked as early as possible.

When an “equivalent air fare” in lieu of kilometer allowance has been requested and approved, no additional time off work (to provide time for driving) will be paid for by the union, unless warranted by an individual’s situation. Each request for time off to drive will be reviewed and decided by a Table Officer on its own merits.

OTHER MISCELLANEOUS EXPENSES, Excluding Dependent Care Expenses:

Members and employees will be reimbursed for other miscellaneous expenses incurred while on union business or while attending an authorized activity or event provided:

1. All expenditures are supported with acceptable (formal) receipts.
2. The specific expenditures are approved by a Table Officer.

All miscellaneous expenditures in excess of \$30.00 should be pre-approved by a Table Officer before incurred.

DEPENDENT CARE REIMBURSEMENT POLICY:

MoveUP recognizes the need to provide reasonable reimbursement to members for dependent care expenses incurred by members while on MoveUP business.

For the purpose of this policy, the definition of dependent is a person who is dependent upon an individual member for their care and support, and who is:

- a) that individual’s spouse; or
- b) the child or grandchild of that individual or of that individual’s spouse up to and including age 15 unless that child or grandchild has special needs; or
- c) the parent, grandparent, brother, or sister of that individual, or of that individual’s spouse.

A maximum claim for reimbursement of \$150.00 per 24-hour day will be paid to members for outside dependent care services (that is, not a family member or spouse of the MoveUP member) for the dependent of a member when that member is on MoveUP business. Where such dependent care is required for less than full day, the amount reimbursed will be based on the number of hours of dependent care at the current “living wage” rate. Where such care is provided by a family member (excluding the COPE member’s spouse or a guardian of the child), a daily allowance of \$50 may be claimed.

MoveUP will only reimburse members for dependent care costs that would not otherwise be incurred by the member.

Members must obtain the approval of the President or Secretary-Treasurer, before incurring dependent care costs in excess of the maximum \$150.00 to be reimbursed by MoveUP.

MoveUP will provide the appropriate form to be completed and submitted for reimbursement of dependent care costs.

MoveUP will assume no other liability of any kind in respect of the providing of dependent care services under this policy.

EXPENSE CLAIM APPROVAL POLICY:

It is **STRONGLY** recommended that when expenditure might be questioned by a Table Officer, regardless of the amount, that the expenditure be pre-approved before it is made.

Only expenditures that, according to a Table Officer, should be a Union expense and conform to this policy will be reimbursed.