

**DISTRICT OF COLUMBIA HEALTH BENEFIT EXCHANGE AUTHORITY
POLICIES FOR TRAVEL AND TRAINING**

**HBX POLICY 2023-1
January __, 2023**

PURPOSE

This document establishes the travel policy to be used by HBX staff seeking authorization and reimbursement for travel and training expenses.

AUTHORITY

D.C. Official Code § 31–3171.04(4) authorizes the agency to establish its own policies related to personnel management, including establishing policies and procedures for reimbursement.

APPLICABILITY

This policy shall be used by all HBX staff seeking authorization and reimbursement for travel and training expenses using appropriated funds.

DEFINITIONS

The term “Travel Officer” means the Executive Director’s designee.

HBX POLICIES FOR TRAVEL AND TRAINING

1. Reimbursable Expenses

- 1.1. Travel expenses must be approved in advance and eligible to be reimbursable. An employee should ensure that all travel expenses are economical and within the approved limits. Unless authorized by the Travel Officer, any travel that exceeds the set amount will not be reimbursable and the employee shall be required to cover those costs. Reimbursable travel expenses include transportation, lodging, meals, incidentals, and miscellaneous costs.
- 1.2. Except where indicated, all expenses on a per diem basis shall be reimbursed according to **GSA** per diem rates. The GSA per diem rates can be found here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>.

2. Transportation

Reimbursable transportation expenses include airfare, ground transportation, rental cars, and personal vehicles.

2.1. Air

- 2.1.1. HBX may use a purchase card (P-Card) to pay for airline tickets in advance, including the cost of purchased seats.
- 2.1.2. If an employee purchases tickets on their own, they must choose a coach class ticket that reasonably meets the travel needs of the employee or HBX. Only coach class tickets are reimbursable unless another class of service is authorized by the Travel Officer.
- 2.1.3. Employees are responsible for paying the cost difference if they choose to fly business or first class.

2.2. Ground

- 2.2.1. Ground transportation includes heavy rail (such as Amtrak, Acela, MARC, and Virginia Railway Express) and intercity bus service, as well as all public transit systems (including subway, bus, and light rail), taxis, ride-hailing services (such as electronically hailed personal vehicles), shared-ride services (such as shared van service to or from an airport, or bike share), shuttles, and other similar means of transportation.
- 2.2.2. An employee may use ground transportation to travel to and from their destination, between places while on official travel, and to obtain meals.
- 2.2.3. Reimbursable tips for ground transportation should not exceed 25% or \$5.00 for courtesy transportation.

2.3. Rail

- 2.3.1. Amtrak tickets may be purchased ahead of time by the agency on a purchase card.
- 2.3.2. If an employee must purchase rail tickets, they must choose a coach class ticket that reasonably meets the travel needs of the employee or HBX for the expense to be reimbursable, unless another class of service is authorized by the Travel Officer.

2.4. Rental Cars

- 2.4.1. Employees shall choose a vehicle up to midsize. Exceptions are permitted to

accommodate a special need of an employee, if additional room is required to transport multiple employees authorized to travel together, if an employee is required to transport a large amount of District government materials, or in cases of severe weather for safety reasons.

2.4.2. Employees should always refuel the vehicle before returning it to the vendor.

2.4.3. Employees shall be reimbursed for tolls, fuel, and parking when using rental cars.

3. Lodging

3.1. Lodging is reimbursable when an employee is traveling on approved travel.

3.2. Employees shall choose the hotel at the GSA per diem rate, or, when applicable, the conference hotel, or as approved by the Travel Officer.

3.3. Upgrade requests for lodging are at the employee's expense and not reimbursable.

4. Meals and Incidental Expenses

4.1. Meals and incidental expenses are reimbursable when an employee is on approved travel.

4.2. Meals and incidental expenses shall be reimbursed on a per diem basis.

4.3. When an employee is on authorized travel, the employee's allowable per diem rate for meals and incidentals is 100% of the applicable daily meal rate, including the day of departure and the last day of travel. Employees attending conferences that furnish meals as a part of the registration or activity fee shall be eligible to receive the full daily meal and incidental expense rate as part of their per diem.

5. Miscellaneous Expenses

Employees who are on authorized travel are eligible to receive reimbursement for miscellaneous expenses. Those expenses include the following:

5.1. Baggage expenses (the first checked bag is reimbursable, the second and subsequent bags are only reimbursable if deemed necessary and reasonable);

5.2. Courtesy tips for baggage handlers are reimbursable up to \$5.00 per service (or checked bag);

5.3. Tips for hotel housekeeping staff are reimbursable up to \$5.00 per day;

5.4. The use of computers, internet, and other work-related needs; and

5.5. Faxes and costs associated to send or receive faxes.

6. Special Needs Travel Expenses

Employees with special needs may be reimbursed for any additional travel expenses that may be required.

RESOURCES

1. Travel Reimbursement Forms:
<https://dchr.sp.dc.gov/policy/PCA/EDPM/Issuances/Attachment%201%20-%20Travel%20Forms.xlsm>
2. GSA Per Diem Rates: <https://www.gsa.gov/travel/plan-book/per-diem-rates>
3. GSA Mileage Rates: <https://www.gsa.gov/travel/plan-book/transportation-airfare-pov-etc/privately-owned-vehicle-pov-mileage-reimbursement-rates>