

**Honolulu Local 162
American Postal
Workers Union, AFL-CIO
Travel and Expense
Reimbursement Policy**

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Introduction

It is the responsibility of each officer/member authorized as a delegate and authorized or appointed members representing the Honolulu Local 162 American Postal Workers Union, AFL-CIO (herein referred to as The Honolulu Local) to know and to comply with the Honolulu Local 162 APWU *Travel and Expense Reimbursement policy*.

This expense reimbursement policy of the Honolulu Local is an “Accountable Plan” and is implemented to reimburse APWU delegates and authorized or appointed members for the entire amount of their actual business expenses within the limits defined below. The GSA Per Diem Rates will be applied for official approved travel.

Reimbursement of expenses also falls under the jurisdiction of the Department of Labor (DOL). To comply with both the DOL and the IRS rules and regulations, the Honolulu Local 162 APWU Travel and Expense Reimbursement Policy requires original detailed receipts and complete documentation (who, what, when, where, and why) be submitted for reimbursable expenses, with the exception of meal and incidental expenses.

Reimbursement of expenses other than the GSA Per Diem can be made only when original, unaltered receipts are provided. Photocopies of either the expense voucher or supporting documentation are not normally accepted by the DOL for reimbursement purposes.

Expense Filing and Approval

- It is the policy of the Honolulu Local that *ALL assignments and trips must be authorized in advance by the Honolulu Local 162 General Membership*.
- Reimbursement of travel expenses will be paid only for assignments/trips that are approved in advance.
- Reimbursement of expenses will be paid only upon completion of travel.
- A separate expense voucher must be submitted for each assignment.
- Expense vouchers should be submitted within *thirty (30) days* of the expense being incurred.

The Honolulu Local assumes no obligation to reimburse authorized members/officers for expenses that are not in compliance with these policies. Expenses that are not specifically covered by this policy require the individual

to contact the Honolulu Local President before incurring the expense to ensure proper approval and reporting requirements are met.

The Treasurer will audit expenses to ensure proper original documentation and approvals are attached. The Treasurer will follow up directly with the member if there are any issues regarding approval or documentation and/or if there are any audit exceptions. The Honolulu Local reserves the right to require a officer/member to reimburse the Union immediately for errors in LWOP and expense reimbursement.

Travel Arrangements

It is the policy of the Honolulu Local that *ALL assignments and trips must be authorized in advance by Honolulu Local 162 General Membership. The Treasurer/President will make all travel arrangements whenever possible. Reimbursement of travel expenses will be paid only for approved assignments and trips. Officers/members must send the original expense voucher to the Honolulu Local President. Officers/members are urged to keep a copy for their own records.*

The most economical form of transportation will be utilized. The Treasurer is required to do a cost comparison (Travel by coach airfare vs. vehicle mileage) to determine the most economical travel. No officer or member will be paid travel expenses that exceed this rate.

Air Travel

The Honolulu Local will pay for coach seating when flying on official union business

The Honolulu Local will not reimburse for the following:

- Priority row seating
- Baggage fee for no more than one (1) personal check-in bag or for overweight bags
- Seating upgrades

Lodging/Hotel

The Honolulu Local will book double occupancy whenever possible and will pay the total cost of the hotel room (including any applicable resort fees, taxes, and associated room fees) in accordance with these policies. The most economical room rate available will be used. If an authorized delegate/officer/member opts to reserve his/her own room, the Honolulu

Local shall reimburse up to 50 percent of the APWU group rate offered by the sponsoring hotel. *For example, if an APWU group rate for a standard room is offered only at Bally's for \$150/night (including all taxes and fees, double occupancy) and Jane chooses to make her own room reservation at the Luxor for \$300/night, then the Honolulu Local will reimburse Jane for only \$75/night, which is 50 percent of Bally's double occupancy special rate.*

Additionally, any room upgrades selected by the individual will not be reimbursed by the Honolulu Local. The Honolulu Local will not reimburse for any hotel incidentals including pay TV. Business telephone charges on your hotel bill are discouraged but allowed and are not considered as part of your per diem. Long Distance phone calls from the hotel must be limited to official business and approved in advance.

Ground Transportation

Additional transportation expenses, such as taxi charges (including tips) and/or transportation to and from airports, will be reimbursed. However, these charges must be fully receipted. Receipts for taxis must include date, origin and destination, charge, and tips, if any. Tips will be reimbursed for business purposes only (e.g. Hotel to Airport to home, or location of business meetings).

Meals

Meals are allowed for the benefit of the authorized delegates and authorized members or officers while on official assignment outside of the 50 mile from the union office. If you are required to travel out-of-town on assignment, you are allowed a set GSA Per Diem for meals and incidental expenses.

Per Diem

Your total per diem allowance is determined by the number of hotel nights plus two travel days. *For example, if an assignment requires an overnight stay in a hotel, you will be allowed one day's full GSA per diem plus two days of GSA per diem at 75% the daily per diem rate.* Tips are provided for in the per diem.

Car Rental

All car rental expenses/options must be authorized in advance by the Honolulu Local 162 General Membership and such documentation must be included with the voucher before reimbursement can be made.

Lost Time Reimbursement

While on business for the Honolulu Local (authorized in advance), authorized delegates, authorized officers, and authorized members will be paid at their hourly base pay for all hours worked, up to EIGHT HOURS (8) PER DAY, to a maximum of FIVE (5) DAYS IN A ROW (OR 40 hours) within a seven (7) day period. This is their Lost Time Reimbursement. The other two (2) days within this seven (7) day period shall be compensated also at their hourly base pay, up to eight (8) hours per day, 16 hours maximum, and for accounting purposes shall be categorized as “other compensation”. They will be paid whether they are on LWOP, annual leave or nonscheduled hours. It is the individual’s own responsibility not to exceed the maximum number of actual LWOP hours allowed under USPS guidelines so as not to jeopardize your USPS fringe benefits. It is also the individual’s own responsibility to ensure that LWOP/lost time hours are accurately reflected on your 3971.

All reimbursement requests for lost wages (LWOP) and “other compensation” must be submitted on a voucher. PS Form 3971 as specified by the Honolulu Local 162 Constitution & Bylaws must be provided with the voucher when requesting lost wages/LWOP to show that the officer or member was on approved LWOP or annual leave from the USPS for the designated period—No Exceptions. After review of the PS Form 3971, the voucher must be approved by the President, or in the case of a voucher submitted by the President, by the Honolulu Local Executive Board as specified in the Honolulu Local Constitution & Bylaws.

Other Compensation

Authorized delegates, officers, and members working on union assignments (authorized in advance) on their non-scheduled days will be paid at their hourly base pay for all hours worked, up to eight hours (8) per day, up to 16 hours within a seven (7) day assignment period. *For example, a member is on a union-authorized assignment from Wednesday, July 1 through Friday, July 10 (total of 10 days). The maximum lost time/LWOP she will be reimbursed is 64 hours (8 days x 8 hours/day) and the maximum “other compensation” will be 16 hours (2 days x 8 hours/day).*

Tax Withheld

The Honolulu Local is obligated to withhold taxes from salaries, lost time/LWOP reimbursement, and "other compensation". Without a completed W-4 form, taxes will be withheld at the "Single with No Exemptions" rate.

X Penak. Mues
President

X [Signature]
Treasurer

President Treasurer

Date

(Approved at the General Membership Meeting Feb 24, 2019)