

Policy:	Travel and Other Expense Reimbursement		
Owner:	VP Finance (CFO) & Performance		
Endorsed By:	VP Finance (CFO) & Performance, Executive Leadership Collaborative	Endorsement Date:	2025-04-13 2025-04-29
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PURPOSE

The purpose of this policy is to establish business-related travel and other expense reimbursement expectations at London Health Sciences Centre (LHSC) that are aligned with the [Broader Public Sector Accountability Act \[Ontario\] \(BPSAA\)](#) and broader public sector directives made under the authority of the BPSAA.

This policy applies – including pre-authorization and documentation requirements, etc. – in any scenario where hospital or hospital-held funds are being used. Where staff/affiliates (e.g. Professional Staff) are seeking reimbursement from other funds – i.e. research, academic/university, division/practice plans, external professional associations, foundations, etc. – the policies and procedures that govern those other funding sources should be followed.

AUDIENCE

This policy applies to all LHSC leaders, staff, including individuals working at LHSC funded through an external source, Credentialed Professional Staff, residents, clinical fellows, volunteers, and students. It applies to work conducted both onsite on LHSC owned and rented properties and remote work.

Any allowable business expenses to be incurred by members of LHSC's Board of Directors (Board) and being reimbursed by LHSC will require pre-authorization from LHSC's CEO and Board Chair (or Vice-Chair in the Chair's absence or if the expense is to be incurred by the Chair). The reimbursement of any such expenses will then be in accordance with the regular process set out in this policy.

This policy does not apply to [consultants or contractors](#). The contract between LHSC and the consultant or contractor will clearly specify any and all reimbursable expenses as covered in the [Corporate Procurement of Consulting Services](#) policy.

POLICY

LHSC is committed to meeting its legislative requirements and facilitating the use of funds ethically and responsibly.

Staff and affiliates are expected to make the most practical, economical, and reasonable arrangements for travel, meals, hospitality, and corporate expenses. Requests for reimbursement are subject to review for reasonableness and compliance with this policy, both prior to and after reimbursement has been made.

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Expense reimbursement will be provided for allowable business expenses under this policy incurred as a result of performing legitimate business on behalf of LHSC. If the type of expense is not listed in this policy, it is typically not eligible for reimbursement. Allowable business expenses should not exceed the amount allocated in the corresponding department budget and should always be the most economical choice. It is the claimant's responsibility to ensure that the claimed or proposed expenses are legitimate hospital business, are reasonable in the context, and are in accordance with this policy. It is the approver's responsibility to approve only those claimed or proposed expenses for legitimate hospital business, which are reasonable in the context, and that are in accordance with this policy. Documentation must accompany all travel pre-approval and business expense reimbursement requests, including the related rationale, expected/actual cost, the value to LHSC, and any supporting documentation or receipts.

When staff/affiliates incur expenses in a situation where they are sponsored by another organization (e.g., Ontario Hospital Association), the reimbursement will be made directly to the individual by the sponsored organization. In instances where a collective agreement or an employment contract specifies reimbursement terms/rates, those terms/rates shall apply.

Allowable business expenses may only be incurred by the person requiring the travel, goods or service, and all expenses must be pre-approved by the corresponding leader.

Leaders have the discretion to make decisions and choices with some degree of flexibility, while maintaining compliance with this policy. All decisions pertaining to incurring and/or approval of travel and other expenses require careful consideration in accordance with this policy. When a Leader exercises their discretion, the Leader must provide their written rationale with the expense report or purchase requisition in the form of a briefing note that is authorized by the corresponding Executive.

Approvers are accountable for their decisions, which should be:

- Able to stand up to scrutiny by the auditors and members of the public,
- Properly explained and documented,
- Fair and equitable,
- Reasonable, and
- Appropriate.

Expense reimbursement payments will only be issued by [Electronic Funds Transfer \(EFT\)](#).

Non-compliance of this policy may result in disciplinary action, up to and including termination or loss of appointment or affiliation with LHSC and reporting to legal and/or regulatory authorities.

ROLES AND RESPONSIBILITIES

1. Non-Reimbursable Expenses

1.1. Generally, expenses of a personal nature are not reimbursable under this policy. Such expenses include, but are not limited to:

- 1.1.1. Expenses resulting from unlawful conduct,
- 1.1.2. Traffic and parking violations incurred while driving on hospital business,
- 1.1.3. Recreational expenses (e.g., video rentals, mini-bars, special facilities charges, entertainment not directly related to hospital business),
- 1.1.4. Personal items not required to conduct hospital business,
- 1.1.5. Any cannabis-related products,
- 1.1.6. Memberships to reward programs or clubs (e.g., airline clubs),
- 1.1.7. Social events that do not constitute hospitality as described in this procedure,
- 1.1.8. Alcoholic beverages under any circumstances,
- 1.1.9. Expenses incurred due to the presence of friends or family members,
- 1.1.10. Hotel expenses incurred because of failure to cancel reservation,
- 1.1.11. Credit card fees and late payment charges, and

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- 1.1.12. Additional ancillary charges such as premiums for failure to refill fuel in a rental car.
- 1.2. All hospital procurement for supplies, equipment, etc. must occur through engagement of the LHSC's procurement agent and in compliance with the [Corporate Procurement of Goods and Non-Consulting Services](#) policy. Expense reimbursement forms are not to be used for such items.
- 1.3. Other restrictions on expenses may be found throughout this policy.
2. **Travel and Transportation**
 - 2.1. Prior to booking, all proposed travel outside of the city of London must be documented in writing for, submitted to, and approved in advance (i.e., pre-approved) by the corresponding leader, using the [Travel/Conference Pre-Authorization Form – Employee](#) or [Travel/Conference Pre-Authorization Form – Professional Staff](#).
 - 2.2. All travel outside of the city of London must also be pre-approved in writing by the most responsible Executive. Beyond this, all out-of-province travel – except that for Credentialed Professional Staff – must be pre-approved by the President and CEO (or the VP Finance (CFO) & Performance as their delegate if unavailable) prior to booking. For out-of-province travel by the President and CEO or the Medical Advisory Committee Chair, prior written approval from the Board Chair or Vice-Chair is required. These additional review/approval processes are facilitated by the [Travel/Conference Pre-Authorization Form – Employee](#) or [Travel/Conference Pre-Authorization Form – Professional Staff](#).
 - 2.3. Documentation supporting pre-authorization (i.e., [Travel/Conference Pre-Authorization Form – Employee](#) or [Travel/Conference Pre-Authorization Form – Professional Staff](#)) is to be retained and submitted along with boarding passes and other receipts when seeking reimbursement.
 - 2.4. Shared travel should be considered when multiple staff/affiliates are attending the same function.
 - 2.5. The mode of transportation with the least cost to LHSC and least amount of interruption to the staff/affiliates' regular business and personal schedule should be chosen.
 - 2.6. Travel expenses for non-LHSC staff/affiliates (e.g., spouse, children, vendors, business partners, etc.), including transportation, accommodation, meals, and incidentals, are not reimbursable by LHSC.
 - 2.7. When personal travel is combined with business travel, staff will be reimbursed for only the business portion of the trip at the lowest available fare.
 - 2.8. All boarding passes or tickets for all modes of transportation must be included with the [Expense Reimbursement Form](#). If a boarding pass is unavailable, then proof of travel must be demonstrated otherwise (e.g., receipts for baggage fees, taxi or ride share to/from airport or train station, accommodations in destination, meals in destination, etc.).
 - 2.9. Prior to departure, all individuals travelling out-of-province are strongly encouraged to ensure they have appropriate travel medical insurance, whether by virtue of enrolment in LHSC staff benefits where such coverage is provided, and/or by personally purchasing through an external insurance company (which is not reimbursable by LHSC).
 - 2.10. When hiring staff/affiliates who will travel regularly as part of their role, leaders should ensure that staff/affiliates are aware of this policy and how its requirements may affect the execution of their duties. Leaders should meet with such staff/affiliates to determine appropriate strategies for policy compliance (e.g. pre-approval for frequent or regular travel, when meals can

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be reimbursed, use of vehicles, etc.). Pre-approval for regular or recurring travel is facilitated through completion of the [Recurring Travel Pre-Authorization Form](#).

2.11. **Additional Rules for Specific Modes of Transportation**

2.11.1. **Travel by Rental Vehicle**

- 2.11.1.1. Rental vehicles should be considered when it is the most practical and economical way to travel rather than the use of a personal vehicle.
- 2.11.1.2. Rental vehicles must be rented in the name of LHSC for hospital business.
- 2.11.1.3. Only staff/affiliates are permitted to occupy a vehicle rented in the name of LHSC and only as required for hospital business.
- 2.11.1.4. Rental of a compact or mid-sized vehicle is encouraged. Consideration may be given for a car rental upgrade based on the number of passengers, weather conditions, and other safety reasons. All luxury and sport car rentals are prohibited.
- 2.11.1.5. For short-term rentals (less than 30 days) in Canada and in the United States only, liability insurance coverage should be purchased from the car rental company. No supplementary collision insurance is necessary as this is covered under LHSC's insurance policy.
- 2.11.1.6. Rental vehicles must be re-fueled before returning to avoid extra charges.
- 2.11.1.7. Receipts for gasoline purchases, parking lot charges and applicable bridge/highway tolls must be submitted with expense reports. If the car rental is not covered by a purchase order, a copy of the rental agreement must be attached to the expense report.
- 2.11.1.8. Staff and affiliates are expected to comply with all applicable provincial and federal regulations, including legislation that prohibits the use of hand-held devices while operating a motor vehicle.
- 2.11.1.9. Pre-approval for regular or recurring travel is facilitated through completion of the [Recurring Travel Pre-Authorization Form](#).

2.11.2. **Travel by Personal Vehicle**

- 2.11.2.1. Travel by personal vehicle should be considered when it is more economical than the use of a rental vehicle.
- 2.11.2.2. Personal vehicles must be insured at the vehicle owner's expense for personal motor vehicle liability. Coverage should be equal to or greater than the minimum liability specified in the Insurance Act [Ontario]. Drivers must decide whether their motor vehicle insurance coverage should include business use of their vehicle and should notify their insurance broker to ensure their vehicle is properly rated. Drivers are responsible for ensuring they have a valid insurance policy with the appropriate limits. LHSC will not reimburse the costs of collision and liability coverage, nor any costs or damages as a result of a collision.
- 2.11.2.3. LHSC assumes no financial responsibility for privately-owned vehicles, including damages as a result of a collision, other than paying the kilometric rate when used for approved hospital business.
- 2.11.2.4. Staff and affiliates using personal vehicles for approved hospital business will be reimbursed with the approved kilometre allowance (refer to [Appendix A - Travel Allowances](#)).
- 2.11.2.5. Only mileage incurred for approved hospital business can be claimed. Mileage calculations should be based on the person's normal/assigned LHSC site or their home, whichever is closer to the place visited. Mileage calculations should be supported with output from Google Maps.
- 2.11.2.6. Staff/affiliates required to travel between sites and within the region to conduct approved hospital business must use discretion when travelling during inclement weather conditions. Area Leadership will ensure that options are available to staff/affiliates to manage time off due to inclement weather, in accordance with applicable policies, procedures, and/or agreements.

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- 2.11.2.7. Receipts for parking lot charges and applicable bridge/highway tolls must be submitted with expense reports. Except for volunteers, monthly parking passes for LHSC's parking facilities are not reimbursable.
 - 2.11.2.8. Staff and affiliates who receive a car allowance as part of their compensation will not be reimbursed for local travel within the region up to a radius of 100 kilometres. Round trips in excess of 200 kilometres will be fully reimbursed. The calculation of distance will be as per procedure [2.11.2.5](#) above.
 - 2.11.2.9. Staff and affiliates are expected to comply with all applicable provincial and federal regulations, including legislation that prohibits the use of hand-held devices while operating a motor vehicle.
 - 2.11.2.10. LHSC does not support, under any circumstance, the transporting of patients or visitors/care partners by staff/affiliates in privately-owned or LHSC vehicles. Alternate transportation is required (e.g., patient transport services, taxi, ride share, etc.)
 - 2.11.2.11. Pre-approval for regular or recurring travel is facilitated through completion of the [Recurring Travel Pre-Authorization Form](#).
 - 2.11.2.12. Pre-approval is not required for travel within the city of London (i.e. between hospital sites, to/from Western, to/from St. Joseph's Hospital or Parkwood campus, etc.).
- 2.11.3. Travel by Train**
- 2.11.3.1. Staff and affiliates are expected to choose the most economical and direct form of transportation by train. Every effort should be made to book in advance to ensure availability of seats and to obtain the lowest fares. (refer to [Appendix A – Travel Allowances](#)).
 - 2.11.3.2. Only basic economy/coach fares will be reimbursed by LHSC, unless pre-approved by the President and CEO. Any upgrades not approved are the responsibility of the staff/affiliate. Upgrade requests for the President and CEO require written pre-approval from the Board Chair or Vice-Chair. Upgrade requests will only be considered in limited circumstances, such as:
 - 2.11.3.2.1. Needing to work with a team,
 - 2.11.3.2.2. Choosing a travel time that allows for a reduction in other expenses like meals and accommodations,
 - 2.11.3.2.3. Accessibility requirements, or
 - 2.11.3.2.4. Health and safety concerns.
- 2.11.4. Travel by Air**
- 2.11.4.1. Staff and affiliates may travel by air for trips that are beyond practical driving distances.
 - 2.11.4.2. Only basic economy/coach fares will be reimbursed by LHSC, unless pre-approved by the President and CEO. Any upgrades not approved are the responsibility of the staff/affiliate. Upgrade requests for the President and CEO require written pre-approval from the Board Chair or Vice-Chair. Upgrade requests will only be considered in limited circumstances, such as:
 - 2.11.4.2.1. International long-haul flights outside of North America,
 - 2.11.4.2.2. Accessibility requirements, or
 - 2.11.4.2.3. Health and safety concerns.
 - 2.11.4.3. Staff and affiliates must obtain the maximum savings on air travel expenses by using the most economical and logical options available for the trip. Every effort should be made to book in advance to take advantage of discounted fares and to obtain the lowest fare.

3. Transportation of Hospital Equipment

- 3.1. LHSC discourages the transport of hospital equipment using personal vehicles. Hospital equipment that is lost, stolen or damaged while being transported in a personal vehicle is not covered by LHSC's insurance policy. Where transportation of hospital equipment using a personal vehicle is considered operationally necessary and is authorized by leadership,

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staff/affiliates should not be required to assume any personal financial risk. The authorizing department assumes financial responsibility for the cost of replacement or repair of such equipment if damaged, lost or stolen.

- 3.2. Alternate transportation, such as taxi, ride share, shuttle, courier, etc., is recommended for transporting hospital equipment. Such alternate transportation is reimbursable under this policy provided the staff/affiliate obtains written pre-approval from the corresponding Leader.
- 3.3. Staff/affiliates must take responsible safety measures to ensure hospital equipment is appropriately secured to reduce the potential for personal injury, theft, or damage (e.g., locking the vehicle, keeping equipment/devices out of public view when the vehicle is unattended).
- 3.4. Staff/affiliates must immediately notify their Leader and Risk Management of any damage to, loss, or theft of hospital equipment and complete an online safety report. (Refer to [Incident Reporting and Management](#)).

4. **Accommodation Costs and Incidentals**

- 4.1. Staff and affiliates are responsible for all room charges and must review the hotel bill carefully to ensure all charges are correct. A detailed copy of the hotel bill must be attached to the expense claim.
- 4.2. Staff/affiliates shall use the most economical accommodation available (generally a standard-quality hotel room). No reimbursement will be made for suites, executive floors, or concierge levels.
- 4.3. Hotel parking charges are reimbursable; however, valet parking is only reimbursable in situations where that is the only parking option at the hotel.
- 4.4. LHSC will not reimburse Incidental expenses (e.g., laundry/dry cleaning services, special facility charges, fitness clubs, toiletries, in-room videos, premium wi-fi, etc.).
- 4.5. When meal charges appear on a hotel bill, these expenses must be separated from the accommodation charges when completing the Expense Reimbursement Form.

5. **Charges for Mobile Device Use While Travelling**

- 5.1. Reimbursement will be made for reasonable costs for necessary phone calls home for each night away. Discretion will be used in the frequency and length of personal calls.
- 5.2. Whenever possible, the most cost-effective method should be used (e.g., hospital-issued cell phones) to minimize costs, including the purchase of cell phone roaming plans ahead of the planned travel.

6. **Meals**

6.1. **Overview**

- 6.1.1. During normal working hours for the work group, team, or individual, meals and refreshments for staff/affiliates are not reimbursable, except in the following circumstances:
 - 6.1.1.1. Out-of-town hospital business (e.g., conferences, training courses, Provincial meetings),
 - 6.1.1.2. Approved business meetings,
 - 6.1.1.3. Periodic light refreshments for volunteers, and
 - 6.1.1.4. Scenarios permitted under the Recognition of Staff and Affiliates section of this procedure.
- 6.1.2. Costs incurred for alcoholic beverages will not be reimbursed. Staff and affiliates who choose to purchase alcohol with their meal at their own expense are encouraged to ask the

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restaurant for a separate bill/receipt for the alcohol to better facilitate the expense reimbursement process for the food portion.

- 6.1.3. When multiple staff and/or affiliates attend an event, either: 1) each person pays and seeks reimbursement individually, or 2) the most senior person pays for everyone and seeks reimbursement.

6.2. Out-of-Town Hospital Business

- 6.2.1. LHSC will reimburse for reasonable meal expenses, subject to approval by the individuals' direct leader.
- 6.2.2. Original, itemized receipts (credit/debit card slips are not sufficient) must be provided with the claim. Meal expenses must not exceed the daily meal allowance maximum as per [Appendix A – Travel Allowances](#).
- 6.2.3. No reimbursement will be made for meals consumed at home prior to departure or on return, or for meals included in the costs of transportation, accommodation, seminars, and/or conferences.

6.3. Approved Business Meetings

- 6.3.1. LHSC will reimburse for reasonable meal expenses resulting from business meetings. First preference should be given to hosting business meetings on hospital premises to reduce costs.
- 6.3.2. Catering is to be provided by LHSC's preferred caterer (subject to their hours of operation) and must be organized by the most senior staff/affiliate in attendance. Supporting documentation must include the name of the course (for training/education) or a list of those in attendance (for business meetings or work outside of normal working hours). Catering requires pre-approval by the most responsible Executive before organizing.

6.4. Periodic Refreshments for Volunteers

- 6.4.1. LHSC may reimburse periodic light refreshments for volunteers (see Recognition of Staff and Affiliates section below).

7. Conferences

- 7.1. The purpose of the restrictions below is to ensure equity within the organization, and to ensure fiscal accountability with regard to public funds. These restrictions pertain specifically to conferences, and do not apply to travel for business meetings, meetings for business development, or sponsored engagements.
- 7.2. LHSC's contribution as a leader in healthcare may require strategic participation in certain conferences. The business rationale and justification in such circumstances needs to be documented and exceptions to the rules in this sub-section can be made with pre-approval by the most responsible Executive. For Executive participation in conferences, pre-approval is required from the President and CEO or the VP Finance (CFO) & Performance using the [Travel/Conference Pre-Authorization Form – Employee](#) or [Travel/Conference Pre-Authorization Form – Professional Staff](#).
- 7.3. The total number of staff from LHSC attending in-person conferences must be consolidated and, prior to registration and/or purchasing conference passes, written approval from the most responsible Executive is required. For Executives, written approval is required by President and CEO or the VP Finance (CFO) & Performance using the [Travel/Conference Pre-Authorization Form – Employee](#) or [Travel/Conference Pre-Authorization Form – Professional Staff](#). For conference travel by the President and CEO or the Medical Advisory Committee Chair, prior written approval from the Board Chair or Vice-Chair is required.
- 7.4. Leaders are expected to monitor compliance with conference restrictions, both those contained within this policy and those imposed through the pre-approval process.

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8. Hospitality

- 8.1. Hospitality is specifically defined in the BPSAA directives and in the Definitions section of this policy. Written approval is required before any arrangements are made for hospitality events. Hospitality expenses require prior written approval by the President and CEO or the VP Finance (CFO) & Performance. Where the President and CEO or the VP Finance (CFO) & Performance request approval for hospitality expenses, prior written approval from the Board Chair or Vice-Chair is required.
- 8.2. Hospitality should be extended in an economical, consistent, and appropriate way when it will facilitate hospital business or is considered desirable as a matter of courtesy.
- 8.3. Where hospitality events are extended by LHSC, and where the guests include vendors (current or prospective), the organizing leader(s) are responsible for obtaining pre-approval from the most responsible Executive and LHSC's procurement agent to ensure that the event does not give, or is not perceived to give, preferential treatment to any vendor.
- 8.4. Acceptance of hospitality from vendors (current or prospective) may constitute a conflict of interest; accordingly sound judgement must be exercised by staff and affiliates. Leaders are responsible for ensuring staff and affiliates are aware of rules of conduct and conflict of interest obligations.
- 8.5. Costs incurred for alcoholic beverages will not be reimbursed.

9. Corporate Events

- 9.1. Events must be located on LHSC-owned or LHSC-rented properties unless limited by room size.
- 9.2. For events held off site:
 - 9.2.1. Prior to booking a facility, the contract must be reviewed by Risk Management.
 - 9.2.2. Risk Management will review the terms and conditions, and will consult LHSC's insurer, as applicable/appropriate.
 - 9.2.3. If Risk Management has approved the contract, the contract and corresponding purchase requisition are sent to the President and CEO or VP Finance (CFO) & Performance for approval and then are submitted to LHSC's procurement agent for final signature and execution. At that time, LHSC's procurement agent will review and approve the contract and return it to the requestor.
 - 9.2.4. The signed contract along with the invoice from the facility should be attached to the purchase requisition.
- 9.3. Costs incurred for alcoholic beverages will not be reimbursed.

10. Social Events

- 10.1. Hospital funds shall not be used for social activities (e.g., retirement parties, office socials, holiday parties, etc.).
- 10.2. Monetary and/or in-kind donations from vendors, prospective vendors, and other external organizations are not to be solicited.
- 10.3. Staff/affiliate social activities can continue to be funded personally by the staff/affiliates involved.

11. Charitable Events

- 11.1. LHSC recognizes the importance that charity plays in our local community, and in particular, the role of our local hospital foundations. In some circumstances, sponsorship of

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charitable events is permitted with the prior approval of the President and CEO. Such expenditures can also be funded personally by the staff/affiliates attending, or by outside vendors and other organizations, subject to the provisions of our [Standards for Business Conduct](#) Policy.

12. Recognition of Staff and Affiliates

- 12.1. Staff and affiliates make important contributions to our healthcare environment every day, and the hospital values all of their efforts. However, the desire to recognize the contributions of staff and affiliates must also be balanced with the concepts of:
 - 12.1.1. Fiscal responsibility – we must live within our budget.
 - 12.1.2. Accountability, transparency, and proper stewardship of public funds, as supported by the hospital's Board and leadership team, and as envisioned by the [BPSAA](#).
 - 12.1.3. Equity – we must embrace the concept of equity (i.e., fairness) over equality (i.e., sameness), while attempting to ensure consistent application of recognition principles across a broad, multi-faceted organization.
 - 12.1.4. Legal compliance – with the [BPSAA](#) and other applicable employment laws and Canada Revenue Agency regulations.
- 12.2. Taking into account the above principles, hospital-funded recognition programs are to be corporate in nature. At a department or unit level, leaders are still encouraged to recognize staff and affiliates intrinsically (e.g. through the “Great Moments” recognition program, through verbal and/or written feedback, with thank-you messages or e-cards, by highlighting accomplishments at team meetings); however, extrinsic or monetary recognition (e.g. bonuses, gift cards/certificates, paid time-off, flowers, other gifts) is not permitted. Accordingly, the following corporate recognition programs have been established:
 - 12.2.1. “Great Moments” program,
 - 12.2.2. Long-Service Awards,
 - 12.2.3. Medical Advisory Committee Awards,
 - 12.2.4. Administrative Professionals Awards,
 - 12.2.5. Patient Safety Champion Awards,
 - 12.2.6. Staff/affiliate memorials,
 - 12.2.7. Staff/affiliate holiday meal,
 - 12.2.8. Staff/affiliate barbeque,
 - 12.2.9. Nurses’ and other professions’ weeks, and
 - 12.2.10. Board recognition events.
- 12.3. In addition, several externally funded recognition programs exist, and are available for recognizing staff and/or affiliates. These include (with further details on eligibility and application processes available from either Human Resources and/or the London Health Sciences Foundation):
 - 12.3.1. Harvey Sullivan Scholarship,
 - 12.3.2. Dianne Stewart Scholarship, and
 - 12.3.3. Kim Wolny Endowment Fund.
- 12.4. Given their significant donations of time and service to LHSC, reasonable and appropriate recognition of volunteers (including elected Board members and Board Committee community members) is permitted under this procedure. All such recognition activities are to be approved by the corresponding Executive or the President and CEO.
- 12.5. Occasionally, some sort of recognition or reward may be appropriate to stimulate staff/affiliate awareness of and/or participation in key corporate initiatives (e.g., surveys, vaccination programs). All such recognition or reward activity is to be approved by the Executive Leadership Collaborative.

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13. Approval and Reimbursement of Expenses

- 13.1. This section sets out the general process for approval and reimbursement of expenses. Where another section of this policy creates additional requirements, those requirements shall be complied with as well.
- 13.2. Staff and affiliates must obtain all appropriate approvals before incurring expenses. If no prior approval was obtained, then a written explanation must be submitted with the claim. LHSC reserves the right to refuse to reimburse an expense where pre-approval was not obtained in accordance with this policy.
- 13.3. Documentation must accompany all travel pre-approval and business expense reimbursement requests, including the related rationale, expected/actual cost, the value to LHSC, and any supporting documentation or receipts.
- 13.4. Staff and affiliates will submit an expense claim by completing the [Expense Reimbursement Form](#) with scanned copies of all fully-detailed receipts attached to the claim, and then obtain appropriate approval (refer to [Appendix B – Submitting an Expense Reimbursement Form](#)). Where receipts are unavailable, it is the responsibility of the approving leader to validate the reasonableness and appropriateness of the expense. Credit card slips or statements will not be accepted in place of original, detailed receipts.
- 13.5. Claims must be submitted within 60 days of the date the expense was incurred. A written explanation is required if not submitted within this timeframe. Staff and affiliates must submit claims for expenses before leaving positions.
- 13.6. All expenses submitted by a staff/affiliate must be approved and signed by the appropriate leader (refer to [Authorizations and Approvals](#) policy). The leader approving the expenses is responsible to ensure all claims are correct, reasonable, and in accordance with this policy.
- 13.7. LHSC will make every effort to reimburse expense claims with all the required receipts attached within a sufficient processing period after the claim has been approved.
- 13.8. All expense report receipts will be retained for future reference.
- 13.9. Staff and affiliates must repay any overpayments to LHSC as it is considered a debt owing to LHSC.

DEFINITIONS

Affiliates – Individuals who are not employed by the organization but perform specific tasks at or for the organization, including:

- Credentialed Professional Staff with a hospital appointment (e.g., Physicians, Dentists, Midwives and Registered Nurses in the Extended Class who are appointed by the Board and who are granted specific privileges to practice medicine, dentistry, midwifery, or nursing, respectively.),
- Residents and Clinical Fellows,
- Students,
- Volunteers,
- Contractors or contracted workers who may be members of a third-party contract or under direct contract with the organization, and
- Individuals working at the organization but funded through an external source.

Business Expenses – Expenses incurred by staff/affiliates when performing hospital business and that fall within the parameters of the Travel and Other Expense Reimbursement policy.

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Consultant or Contractor – Person providing services to the hospital on an independent contractor basis, and who is not an employee or affiliate of the hospital.

Hospitality – In accordance with BPSAA Directives, hospitality is the provision of food, beverage, accommodation, transportation, entertainment, or other amenities in the course of a social/entertaining event (lunch/dinner/reception) paid out of public funds to people who are not engaged to work for designated BPS organizations or any of the Ontario Government ministries, agencies and public entities.

REFERENCES

Legislation

[Broader Public Sector Accountability Act](#)

[Highway Traffic Act](#)

[Compulsory Automobile Insurance Act](#)

[Insurance Act](#)

Corporate

[Standards for Business Conduct](#)

[Authorizations and Approvals](#)

[Corporate Procurement of Consulting Services](#)

[Corporate Procurement of Goods and Non-Consulting Services](#)

[Incident Reporting and Management](#)

Other References

[Broader Public Sector Expenses Directive](#)

[Travel, Meal and Hospitality Expenses Directive](#)

Forms

[Expense Reimbursement Form](#)

[Travel/Conference Pre-Authorization Form – Employee](#)

[Travel/Conference Pre-Authorization Form – Professional Staff](#)

[Recurring Travel Pre-Authorization Form](#)

APPENDICES

Appendix A – [Travel Allowances](#)

Appendix B – [Submitting an Expense Reimbursement Form](#)

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