

SYSTEMWIDE POLICY

Travel and Expense Reimbursement Policy

This Policy is Applicable to the following Corewell Health sites:

SYSTEMWIDE

Continuing Care, Corewell Health Beaumont Grosse Pointe Hospital, Corewell Health Beaumont Troy Hospital, Corewell Health Big Rapids Hospital, Corewell Health Dearborn Hospital, Corewell Health Farmington Hills Hospital, Corewell Health Gerber Hospital, Corewell Health Grand Rapids Hospitals (Blodgett Hospital, Butterworth Hospital, Helen DeVos Children's Hospital), Corewell Health Greenville Hospital, Corewell Health Ludington Hospital, Corewell Health Medical Group East, Corewell Health Medical Group West, Corewell Health Pennock Hospital, Corewell Health Reed City Hospital, Corewell Health South (Niles, St. Joseph, and Watervliet Hospitals; Corewell Health Medical Group South; Applicable Corewell Health South Regional Sites), Corewell Health Specialty Pharmacy, Corewell Health Taylor Hospital, Corewell Health Trenton Hospital, Corewell Health Wayne Hospital, Corewell Health William Beaumont University Hospital (Royal Oak), Corewell Health Zeeland Hospital, Corporate (Corewell Health East), Corporate (Corewell Health West, South and Priority Health), Outpatient/Physician Practices (CHW), Priority Health

Applicability Limited to:	N/A
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Functional Area:	Finance
Department Area:	Corporate Accounting, Finance, Financial Reporting

1. Purpose

The purpose of this policy is to establish comprehensive guidelines for expenses associated with business travel and expenses for all team members of Corewell Health. The Internal Revenue Service ("IRS") requires specific documentation for team member reimbursement which is the basis for these guidelines.

The President & Chief Executive Officer or the Chief Financial Officer reserve the right to temporarily restrict provisions of this policy and/or require Senior Vice President level approval as necessary, from time to time. Appropriate communication will be provided to all Corewell Health team members in these circumstances.

2. Definitions

This section establishes the working definitions for key Team Member types referenced in this policy.

- **Employed** – an individual who receives their paycheck from Corewell Health.
- **Non-Employed** – an individual who does not receive their paycheck from Corewell Health but is eligible for expense reimbursement (for example: contingent workers).
- **On-Site Team Member** – an individual who regularly works at a Corewell Health location.
- **Hybrid Team Member** – individual who sometimes works off-site and sometimes works on-site at a Corewell Health location.
- **Remote Team Member** – an individual who regularly works off-site, without any designated on-site hours.

Entities will reference associated Documentation contained within this document as applicable
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3. Policy

3.1. Reimbursement Process

- 3.1.1. Corewell Health team members are required to submit reimbursement requests through the online Expense Report in [Workday](#) within 60 days from the date the expense was incurred. Expenses greater than 60 days old will require additional Senior Vice President approval for an exception. Reimbursement is likely to be denied and travel privileges revoked if expense reports are not submitted in a timely and accurate manner.
- 3.1.2. Non-employed team members entitled to expense reimbursement by Corewell Health will be required to submit the appropriate Supplier Invoice Request (for non-employee) in Workday, supported by required documentation consistent with the requirements of this policy. Refer to [Accounts Payable](#).
- 3.1.3. Reimbursement payments will be paid weekly through direct deposit (separate from payroll) for Corewell Health team members receiving payroll through Workday or an accounts payable check for non-employed team members.
- 3.1.4. Reimbursements will be denied for reasons including, but not limited to:
 - 3.1.4.1. Expenses that lack required documentation
 - 3.1.4.2. Expenses that do not include a specific business purpose
 - 3.1.4.3. Expenses determined to be unreasonable as to the amount requested
 - 3.1.4.4. Cash Advances for anticipated travel expenses
 - 3.1.4.5. Expenses not actually incurred, i.e., not associated with the travel, or previously submitted.

3.2. Receipts

Itemized receipts are always required for hotel/accommodations, airfare, business meals, and all expenses greater than \$75.

For any expense charged to a grant work tag or funded from a grant, a detailed receipt is required even if the expense is below the \$75 threshold. This requirement exists as both federal and non-governmental awards have specific requirements for reimbursement.

The documents provided should detail the expense and provide proof of a processed payment.

3.3. Approval

Team members traveling or incurring expenses on behalf of Corewell Health must have authorization (verbal or email) from their direct supervisor before incurring any expenses. If the estimated expense reimbursement exceeds \$5,000 or includes international travel, formal pre-approval must be obtained by creating a Spend Authorization in Workday. The [Senior Vice President Override Approval Form](#) should be used by those who cannot access Workday. Failure to receive the appropriate pre-approval may result in denial of the reimbursement.

The approving direct supervisor is responsible for reviewing the accuracy and validity of submitted expenses. By approving the expense report, the supervisor confirms review and adherence to the policies and assumes accountability along with the team member.

Upon submission of a team member expense report for approval, the approver will be the team member's direct supervisor or designee. Additional approvals may be required by the

cost center, grants, or project manager. The approver for non-team members will be the director responsible for their activities.

3.4. Mileage and Personal Use of Automobile

Team members will be reimbursed for auto mileage incurred in the ordinary and necessary conduct of Corewell Health business in compliance with the IRS rates in effect during the period of travel. Team members will be reimbursed for travel when they start at one Corewell Health location and travel to another work-related location with certain exclusions or limits noted below. Mileage will also be reimbursed for travel that exceeds the team member's standard commute for the day if starting or ending the day at a location other than their primary location. Standard commute miles (residence to primary work location) will not be reimbursed for any travel including weekends, holidays, or other non-scheduled work time.

If tolls are incurred by a team member when using a personal automobile for business purposes, those amounts are reimbursable.

The primary work location is considered the team member's default location in their worker profile.

Team members must have a valid driver's license and proper levels of insurance to use their automobile for Corewell Health business.

A team member eligible for an auto allowance or stipend should refer to their respective agreement.

3.4.1. Local Travel

Local Travel is considered any destination with a one-way distance of 10 miles or less from the originating location.

- Reimbursable (exempt from local mileage exclusion):
 - Team members that provide direct patient care and are required to provide that care at multiple sites during a single shift.
 - Team members who make multiple patient/referral visits in a work day.
 - Team members that are required to travel between Corewell Health locations on a regular basis for their job responsibilities.
- Non-reimbursable:
 - Local travel for administrative related work/meetings (including multiple trips in a single day between facilities that are individually 10 miles or less).
 - If a team member covers another team member's shift or picks up another shift that requires travel between two facilities.

3.4.2. Team members with No Regular Office and No Home Office

The first business contact (location) in a particular day is considered the team member's office. Mileage expenses between the residence and the first business location will not be reimbursed. Mileage expenses between the last business location and their residence will not be reimbursed. Mileage from one business location to another will be reimbursed, subject to the Local Travel exclusion.

3.4.3. Hybrid Team Members

Hybrid team members may be expected to come to a Corewell Health location as though it is the worksite. (All team members have an assigned Corewell Health work location on record – regardless of whether the team member regularly reports to that location.) In those circumstances:

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- Team members are not entitled to travel and expense reimbursement, including mileage, for travel to/from home to the work location. If the work location is different than the team member's primary work location, the team member is eligible for mileage in excess of their commute from home to their assigned Corewell Health work location.
- Team members who have flexibility in when they may come to their assigned work location, and who choose to do so in the middle of the work shift, are not entitled to travel and expense reimbursement.

3.4.4. Remote Team Members

Remote team members traveling to or from a Corewell Health location are not eligible for travel and expense reimbursement.

3.4.5. Exception Approval Process for Remote and Hybrid Team Members

Corewell Health may have a business purpose to negotiate out of state travel expense reimbursement as a part the recruitment process to fill critical positions within the organization. If a leader would like to pursue this exception, a business justification would need to be submitted to the Senior Vice President responsible for the department and the SVP, Corporate Controller for approval. If approved, the specific details will be documented in the candidate's offer letter.

3.5. Business Meals

3.5.1. Business Meals – Off-site (Leadership, Strategic Planning and/or Recruitment)

Team members will be reimbursed for off-site business meals pertaining to leadership, strategic planning and/or recruitment that supports the mission and vision of Corewell Health. The reimbursement request must include the business purpose, as well as a listing of all attendees, including their title and business affiliation. These meals are limited to \$75/person.

Reasonable costs for up to one (1) alcoholic beverage per person during an off-site business meal are reimbursable under the following conditions:

- The beverage accompanies dinner.
- They are claimed separately from the meal portion of the expense using the specific Expense Item "Alcohol" on the Expense Report.
- Approved by a Vice President or above.

The following documentation is required:

- Detailed receipt and proof of payments (non-itemized credit card receipts/statements are not sufficient documentation)
- Meeting agenda that clearly states the Corewell Health business purpose
- Attendees

3.5.2. Business Meeting Meals – On-site

Reimbursement will be provided to Corewell Health Team Members and non-team members for modest on-site business meals (i.e., sandwiches, pizza, etc.) and light refreshments/beverages that are served at on-site business meetings lasting four hours or longer. These meals are limited to \$25/person.

Meals should not be served at meetings that are less than four hours in duration. These expenses will not be reimbursed.

The following documentation is required:

- Detailed receipt and proof of payments (non-itemized credit card receipts/statements are not sufficient documentation)
- Meeting agenda that clearly states the Corewell Health business purpose
- Attendees
- Date, location, and duration of meeting

3.6. Travel Meals (Individual)

Meals are reimbursed up to a total of \$75 per day (including tips) for out-of-town travel. The requested reimbursement must be based on actual expenses paid. If meals are available through the conference, the daily amount should be reduced accordingly.

Alcohol is NOT reimbursable.

3.7. Office Supplies/Miscellaneous Purchases

Team members who need office supplies may work with their leader to acquire them through the Corewell Health catalog Requisition process: [Procurement SharePoint](#). Team members will not be eligible for the reimbursement of office supply expenses that are purchased outside of this process.

Miscellaneous business expenses that cannot be obtained Procurement are reimbursable (as policy exception) when accompanied by a detailed justification.

3.8. Conference / Professional Development

Corewell Health encourages a virtual first approach to conferences and professional development if an effective virtual option is available.

Only one team member should attend a conference. An exception to this policy will be given when the conference offers multiple breakout sessions. In this instance, team members are required to attend different sessions.

Non-Provider team members are limited to the following number of conferences/professional development events during a calendar year:

- Vice Presidents and above: No more than two (2) offsite conferences per year will be reimbursed
- Directors: No more than one (1) offsite conference per year will be reimbursed
- Managers: Conference fees for no more than one (1) virtual conference per year will be reimbursed
- Individual Contributors: No-cost virtual options should be used

Exceptions to the policy above require Senior Vice President approval and should be limited to specific business needs or training that is required for the team member's role.

The team member agrees to disseminate learnings within 30 days of attending the professional development through either a formal presentation or a related project.

Approved conference fees must be paid personally. Request for reimbursement can be submitted when the detailed receipt and proof of payment are available.

Reimbursement should be requested with the appropriate documentation which includes:

- Conference/Event agenda detailing the location and dates
- Detailed receipt and proof of payments (non-itemized credit card receipts or statements or uncashed copies of personal checks are not sufficient documentation)

Voluntary political and/or other donations that are added on to the conference registration fee will not be reimbursed.

Physicians and other provider team members should refer to the applicable Continuing Medical Education (CME) policy for reimbursement of Conferences/Professional Development.

Corewell Health East Nursing Professional Development benefits are excluded from this section of the policy. Corewell Health East Nurses should submit inquiries and requests for reimbursement pertaining to Professional Development expenses to Benefits Administration through the [HR Case in ServiceNow](#).

3.9. Dues & Subscriptions (Excluding Continuing Medical Education)

Corewell Health may allow for the payment of dues and fees if required for a team member's or department's position and duties, and if the membership or subscription provides a benefit to Corewell Health. Dues and fees that are allowed are listed below and apply to both new membership requests as well as requests for membership renewals.

- Membership dues to professional organizations.
- Membership dues for professional certifications required for a team member's role.
- Subscriptions to professional journals or newspapers, only if required for the job and limited to one publication.

Dues and subscriptions that are not reimbursable include but are not limited to:

- Lifetime memberships
- Airline and airport clubs
- Memberships for entertainment only

Senior Vice President approval is required for memberships that are in addition to the enterprise-wide memberships that are available (e.g., HFMA).

Continuing Medical Education (CME) benefits are exempt from this section of the policy. Physicians and other providers should refer to the Continuing Medical Education (CME) Policy for reimbursement of dues and subscriptions.

3.10. Tuition Assistance

Please refer to Corewell Health's Tuition Assistance Policy- [Tuition Assistance](#)

3.11. Airfare

All Airfare related expense are to be booked the [Corewell Health designated travel agency](#) unless there is a demonstrated better value on a per case basis. If booked outside of the Corewell Health designated travel agency, team members must attach documentation that illustrates a better value for reimbursement. Team members should be aware that airline tickets purchased elsewhere may not be considered reimbursable. Providers making travel arrangements for individual CME (CME Allowance Plan use) are NOT REQUIRED to use Corewell Health's designated travel agency. Corewell Health's designated travel agency is required for all other travel including departmental funded CME trips.

The direct bill payment option is not available for travel related to CME. Providers must use a personal (out-of-pocket) method to pay for travel when it is being purchased under a CME allowance plan and is booked through the Corewell Health designated travel agency. Once purchased, providers can submit the expense for reimbursement.

Corewell Health will make direct payment for airfare through the Corewell Health designated travel agency for all non-CME related travel.

Domestic air travel must be made for a refundable class not to exceed Main Cabin only by the most direct or economical route to the destination. Fees for airline upgrades (i.e.: preferred seats, class upgrades and trip protection) are not reimbursable.

Airline baggage fees will be reimbursed for one checked luggage per flight.

3.12. Hotels

Hotels (unless affiliated with a conference sponsor) should be made through the [Corewell Health designated travel agency](#) - unless there is a better demonstrated value (documented and attached to the expense report - including but not limited to the use of Airbnb and VRBO). Hotels for all events should be selected to provide accommodations convenient to the meeting. Providers making travel arrangements for individual CME (CME Allowance Plan use) are NOT REQUIRED to use Corewell Health's designated travel agency. Corewell Health's designated travel agency is required for all other travel including departmental funded CME trips.

Hotel stays related to non-local travel to Corewell Health sites (or other non-local sites for purposes of conducting business on behalf of Corewell Health), are reimbursable when the matter of business is being conducted again the next day.

Reimbursement will be made for lodging at the conference rate or the hotel rate for single occupancy at the completion of the trip.

Hotel charges are the responsibility of the team member and will be reimbursed by Corewell Health at the completion of the trip. Reimbursement is based on single occupancy rates. If a hotel deposit is required prior to the date of business, the team member may seek reimbursement with detailed documentation supporting the processed payment transaction.

Reimbursement of hotel expenses (other than deposits) will be made only after completion of the trip.

Corewell Health will only reimburse expenses for team members or authorized non-team members. Refer to [Section 3.16](#)

3.13. Telephone/Internet

Business and personal telephone calls made using a personal mobile device are not reimbursable.

Necessary business internet fees incurred while traveling for business will be reimbursed if itemized and noted as "business" on hotel statements or noted within the expense item on the reimbursement report.

Home internet costs are non-reimbursable expenses.

3.14. Ground Transportation

Reimbursement will be made for the most appropriate and most economical means of ground transportation. This expense type includes vehicle rental, train, taxi, Uber/Lyft, and other similar public transportation. This also includes road tolls.

Vehicle Rental

- All vehicle rental arrangements should be made through a [Corewell Health designated travel agency](#). Providers making travel arrangements for individual CME (CME Allowance Plan use) are NOT REQUIRED to use Corewell Health's designated travel agency. Corewell Health's designated travel agency is required for all other travel including departmental funded CME trips.
- Vehicle rental will be reimbursed for an intermediate or mid-size rental unless there are more than four (4) passengers.
- Team members will not be reimbursed for elective coverage such as personal accident insurance (PAI) or the full collision damage waiver (DW.CDW) offered on rental contracts, except if traveling outside the continental United States. Team members are covered under Corewell Health's general liability insurance policy
- Before returning the rental vehicle, the team member must fill the gas tank to the level determined by the agreement. A Fuel Service Option (FSO) is elective and considered non-reimbursable.
- Team members will not be reimbursed for roadside assistance insurance/protection, car seats, GPS units, satellite radio, luggage racks, winter tires or toll pass devices.

Taxi, Pre-arranged Rides or Ride Sharing (including but not limited to Uber or Lyft)

- The costs to and from the airport and the conference site (reduced by standard commute) are reimbursable expenses.
- Pre-arranged rides should only be used when the cost of the pre-arranged ride is comparable to the taxi or ride share.

3.15. Parking

- Parking fees are reimbursable expenses and will include parking at the local airport as well as parking at conferences.
- Costs for valet service are reimbursable in instances where the hotel exclusively offers valet parking.
- Parking costs are not reimbursable at Corewell Health facilities.

3.16. Tips

Reasonable tips are reimbursable for bellhops, porters, and taxi drivers. Food service tips should not exceed 20%.

3.17. Guests

Team members can have a travel companion accompany them on business trips. All incremental and additional charges (hotel, meals, airfare, etc.) are the responsibility of the team member and are not reimbursable by Corewell Health. Team members will only be reimbursed for hotel accommodations at the conference rate or single occupancy rate.

3.18. Technology

The procurement of technology such as hardware, software, applications, network-attached devices, data storage and processing, and related professional services must follow the Corewell Health [Technology Procurement Policy](#). This policy assures that management of technology and the associated risks meet Corewell Health standards. Technology related costs are non-reimbursable if included on an expense reimbursement request.

Procurement includes the process of acquiring goods or IS/IT services (including proofs-of-concepts or "demos"), using contracted labor for IS/IT services, and negotiating directly with suppliers for contract terms and pricing. It also includes the quotation, acquisition, receipt and payment for all IS/IT assets and services within Corewell Health.

3.19. Employee Recognition

Entities will reference associated Documentation contained within this document as applicable
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- See [Corewell Health Recognition Program Overview](#) for guidelines on Employee Recognition and Rewards.

3.20. Non-Reimbursable Expenses

The following items are specifically not reimbursable (not exclusive) expenses by Corewell Health. These include, but are not limited to:

- “Personal” charges (movies, laundry, recreation, parking tickets or traffic violations, health clubs, ATM fees, etc.)
- Airfare upgrades (i.e.: preferred seats, class upgrades and trip protection)
- Expenses for team member gifts and meals related to the celebratory recognition of “personal” events; including but not limited to birthday, new baby, holiday, wedding etc.
- Payments made by perk miles, points, credit vouchers or gift cards.
- Gift cards or gift certificates of any value or for any reason are not reimbursable but can be ordered through Supply Chain Services with Senior Vice President approval. Gift Cards represent taxable income to Corewell Health Team Members.
- Medical or non-medical supplies (including office supplies) that are normally acquired through the standard Catalog process (i.e.: Supply Chain Services) or issued through inventory (e.g., Walkent Warehouse). If you are uncertain if a purchase is in violation of this policy, please contact the Supply Chain Services department directly at (616) 391-5555.
- Hazardous materials.
- Any equipment that is required to go through the Capital Acquisition Process (see also [Property Plant and Equipment \(PPE\) Capitalization and Depreciation Policy \(Excluding Software Developed or Obtained for Internal Use\)](#)).
- Relocation and moving related expenses are not reimbursable through the expense reimbursement application. Note: ALL Relocation related expenses are to be facilitated by the HR Talent Acquisition Recruiter for processing.
- Donations

3.21. International Travel

International travel must be pre-approved by a Senior Vice President on a Spend Authorization report on a per-trip basis. Incidental expenses must be reviewed on a per-trip basis by an authorized signer.

It is the team member’s responsibility to convert the expenses incurred from foreign currency to U.S. dollars on each receipt based on the current exchange rate. The U.S. dollars should be placed on the expense report form and submitted in the online expense reimbursement tool. This conversion will be reflected automatically on a credit card statement if a personal credit card is used.

If a conference rate is available, the team member should give the information to a [Corewell Health designated travel agency](#). In the case of reduced fares found outside Corewell Health’s designated travel agency, reimbursement will occur only with an accompanying designated travel agency quote.

3.22. Travel Cancellation

If cancellation is necessary, the team member is responsible for the following:

- Notify Accounts Payable that the trip has been canceled
- Notify Corewell Health’s designated travel agency to cancel the arrangements
- Cancel hotel and related credit card hold
- Notify conference sponsor and collect any pre-paid registration
- Forward refund checks to accounts payable

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3.23. Policy Exceptions

Any exceptions for reimbursement that are outside of these guidelines must have Senior Vice President approval, except for gift cards as noted in Section 3.20 above. The [Senior Vice President Override Form](#) should accompany the reimbursement.

If any of the forms submitted by a team member do not comply with the guidelines established in this policy, they will be considered “policy exceptions”, will not be paid and will be returned to the appropriate person. The approval of a Senior Vice President is required to override a “policy exception”.

If receipts are lost, the completed [Missing Receipt Affidavit](#) (Corewell Health West, South and Priority Health Link) [Missing Receipt Affidavit](#) (Corewell East link) must support the Expense Report. Reimbursement shall be made at the stated cost, including tips, up to Corewell Health’s prevailing allowance for meals.

- 4. Policies Superseded and Replaced:** This policy supersedes and replaces the following policies as of the effective date of this policy: [Travel and Expense Reimbursement Policy, 637 (v.4) Legacy Spectrum Health; Employee Expense Reimbursement, Legacy Beaumont Health]

5. Revisions

Corewell Health reserves the right to alter, amend, modify or eliminate this document at any time without prior written notice.

6. Policy Development and Approval

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