

Travel Policy and Expense Guidelines

This policy supersedes all previous travel policies and guidelines distributed by Gallagher Enrollment Solutions (GES). This policy and guideline document applies to assignments; however, other policies may be applicable.



Timeline for Enroller Travel:

- Once you have been assigned to a case, your designated contact will email you a confirmation statement to which you will reply for your travel needs.
- Once travel needs have been confirmed, GES will begin travel reservations and bookings.
- Personal information needed to book travel is included in the Enroller Profile
 - ❖ Please ensure that you have completed and returned this form to GES.
 - ❖ You will receive a welcome letter from Egencia (the travel platform partner). Please follow the instructions to complete your profile as directed. These steps must be completed before travel can be processed.

Enrollment Related Travel Itineraries:

- Your designated contact will supply you with a travel schedule/itinerary once all case travel is completed.
 - ❖ Your travel schedule/itinerary will contain the following information:
 - Flight days, times, and airline confirmation number(s).
 - Hotel name, address, phone number, check in and check out dates.
 - Rental car agency name, confirmation number, pick up and return dates and if applicable, the name of the Benefit Counselor with whom you will be sharing a rental car.

Please Note:

- As the travel schedule/itinerary is used to reconcile payroll and expenses, it is expected that you follow the travel schedule/itinerary as outlined.
- ★ **IMPORTANT! All travel schedules/itineraries should be reviewed within 24 hours of them being received.** If you cannot review them within this time frame, please email your designated contact immediately.
- Do not make any changes to your travel schedule/itinerary that has been planned for you. **Please notify your designated contact if you notice any discrepancies or typos.**

Enrollers Who Live Within the Geographic Area

If you live within 50 miles of the enrollment location you are considered local and will not lodge at a hotel, receive a rental car or be eligible for airfare at GES expense. You **will not** receive a daily per diem. You are paid a daily wage for each workday assignment.

Travel to the Enrollment Location



Air Travel

Where deemed appropriate (based on geographic considerations) by GES, you will be furnished an airline ticket to the enrollment location at the beginning of the enrollment period and at the end of the enrollment period.

- Enrollers within 250 miles from the work destination will not be provided airline travel.
- GES will book flights, as appropriate, to and from enrollments based on work schedule, availability and cost of flights. GES books the most reasonable flight with the most reasonable associated cost.
- GES provides an airline ticket based upon assurance from the enroller that he/she is committed to the work assignment; if the enroller fails to report for work, the enroller shall reimburse GES the cost of the purchased ticket.

Gallagher Enrollment Solutions is **not required to take into consideration the following: The Enroller must set up their personal preferences within their Egencia Profile.**

Seat Preferences

Frequent Flyer Points and Rewards

TSA Pre-Clearance Numbers

Flight Upgrades

Special Meals or Assistance

- For return flights home, GES may book flights at 12:00pm or after, so that you may pack and ship any necessary items back to the home office.



Personal Luggage Fees

Personal luggage may travel with you on your flight or you may elect to ship your personal items directly to the lodging location.

- The cap for reimbursement on personal luggage fees is \$75.00 one way. If you choose to ship your luggage via UPS Ground, the **cap** is also \$75.00 one way. **Only one of these options will be reimbursed.**
- Luggage fees will be reimbursed upon receipt of a completed expense report with copies of the receipts via ExpenseWire.



Airport Parking

Airport parking (Long or Short Term) is **NOT** reimbursable.

- GES will pay up to \$75.00 each way for transportation to/from the airport from/to your home with a valid transportation receipt.



Rental Car Usage

GES will provide a rental car as deemed necessary by GES when an enroller travels to and from the enrollment location via air travel. Rental cars are typically available upon arrival at an airport.

- GES has a direct bill agreement with an approved rental car supplier. GES will make a car reservation with the most economically competitive supplier.
- GES does promote sharing of rental cars when possible. Any GES employee or independent contractor can drive the rental car (with a valid drivers' license and proof of insurance) regardless of who picked up the car. GES will pair you off in teams of 2 or 3 based on your airport arrival time. Teams may be rearranged during the training session in order to accommodate the enrollment schedule.
- If applicable, anyone who has a rental car is expected to share and make the car/transportation available to anyone who may need it.
- Rental cars will be the most economical cars unless specifically authorized by GES.
- GES does not provide rental car insurance. **It is the enroller's responsibility to purchase/maintain rental car coverage during the rental agreement.**

- ★ • Return your rental car with a full tank of gas to avoid exorbitant refueling charges. **All refueling charges invoiced to GES by the rental car provider will be recaptured from your final travel day payment.** To avoid this reduction in your final payment, return your rental car with a full tank of gas at the time of drop off. Show (but do not give) your gas receipt to the attendant at the point of return.
- Gas expenses for rental cars are for business purposes only and will be reimbursed upon receipt of a completed expense report with copies of the receipts via ExpenseWire.
- All rental cars shall not be picked up prior to the established reservation date nor shall the rental be returned after the established rental return date. Additional expenses for rental car utilization outside the pickup and return date will be the financial responsibility of the enroller.
- Only daily rate and associated taxes and fees will be direct billed to GES. Upgrades are **only** allowable if added by the rental counter at no additional cost. GES will not be responsible if counter upgrades are charged to the account and will be the responsibility of the enroller.
- ★ **Unauthorized charges include: Upgrades, GPS, Satellite Radio, Wi-Fi, Auto/Rental Insurance, Additional Driver, Roadside Assistance, Convenience Fee Fines, Fuel Service Options or Refueling.**
- When a rental car is furnished by GES, such car is to be used for travel to and from lodging and worksite (typically five days a week). Use of rental cars is restricted to business purposes; use for personal purposes (sightseeing, personal trips, etc.) is prohibited.
- Vehicle toll expense while in a rental incurred for work purposes only, shall be paid by the enroller to the toll booth attendant or via a toll pass. Such expenses will be reimbursed upon receipt of a completed expense report with copies of the receipts or a detailed Toll Account Summary via ExpenseWire. **NOTE: Avis/ Budget includes all toll charges on the direct bill statement. Use the above method for reimbursement of tolls if you have an Enterprise Rental.**
- If an enroller desires to not take advantage of the rental reservation provided by GES, the enroller may rent from other rental companies. However, it must be communicated prior to travel being booked. The maximum reimbursable amount shall not exceed the amount for which GES can reserve a vehicle. Any additional expenses incurred by the enroller will be at the enroller's own expense.

- **For all car rental reservations booked by GES or enroller a final rental car receipt** must be submitted/uploaded to GES the end of every assignment via the www.enrollerinfo.com portal.



Personal Vehicle Usage

An enroller may elect to use a personal vehicle in lieu of an airline ticket or rental car.

- GES will pay mileage at the rate of \$.55 per mile up to a maximum of 910 miles (roundtrip) to and from the enrollment or \$500.00.
- GES will pay mileage at the **rate of \$.55 per mile up to a maximum of 1,500 miles** for a three leg trip (i.e., the enroller travels from residence to enrollment location, to a second enrollment location from the first enrollment location, and back to the residence from the second enrollment location) to the enroller who provides the vehicle.
- Mileage for personal vehicle use to and from work location(s) must be documented daily in ExpenseWire for reimbursement.
- Vehicle toll expenses incurred for work purposes only, shall be paid by the enroller to the toll booth attendant or via a toll pass. Such expenses will be reimbursed upon receipt of a completed expense report with copies of the receipts or a detailed Toll Account Summary via ExpenseWire.



Lodging for Enrollments

- Typically, GES considers lodging for anyone outside a 50 miles radius from the enrollment location. Lodging will not be provided if you are within 50 miles of the enrollment location unless approved by management.
- GES will locate appropriate lodging accommodations within the enrollment locality. In certain circumstances, when GES does not secure lodging accommodations, the enroller is expected to locate and secure lodging on their own.
- When possible, GES will establish a direct billing arrangement with the lodging provider. Room and tax will be billed to the GES master account. **The enroller will need to present a personal credit card upon arrival for incidental charges.**

- Lodging reservations are typically guaranteed and held with a GES credit card. Failure to arrive on specified reservation arrival date will result in a cancellation fee, which at a minimum is the cost of one night's lodging expense. If, for any reason, a reservation cannot be met, it is the responsibility of the enroller to cancel all reservation accommodations directly with the hotel and notify travel immediately. **Failure to comply with this policy will result in the enroller incurring all associated expenses for the unfulfilled reservation.**
- If a direct billing arrangement has not been secured with the lodging provider, GES, at its discretion, may advance funds to the enroller for purposes of paying room and tax costs directly to the lodging provider. Regardless of the method of payment, the amount for room and tax is determined on a case by case basis.
- GES will pay each traveler by personal vehicle that requires overnight stay lodging up to \$90.00 each way provided the distance warrant an overnight stay (usually 8-9 hours of driving time). A hotel receipt is required for reimbursement.
- When enrollers elect to secure their own lodging arrangement, instead of the lodging arrangement secured by GES, the enroller will be responsible for paying all lodging expenses directly, and this must be communicated prior to travel being booked. Lodging expenses that exceed the room and tax cost of the lodging secured by GES are not reimbursable. Lodging (room and tax) will be reimbursed upon receipt of a completed expense report with copies of the receipts via ExpenseWire.
- Enrollment locations and/or dates may change at any time to accommodate business needs. GES **will not** be responsible for reimbursing the enroller's lodging expenses related to these changes (i.e., non-refundable room rates, changes in room rates, etc.) It is the enroller's responsibility to check the cancellation/refund policies of the lodging location before booking.
- Upon conclusion of the enrollment, all lodging receipts must be submitted/uploaded via the www.enrollerinfo.com portal to allow GES to perform a reconciliation of cumulative hotel expenses.



Expense Reports

- Reimbursement for eligible expenses will be paid upon receipt of a completed expense report with all receipts via ExpenseWire.
- Expense Reports will be **accepted for processing up to two (2) weeks following** completion of the relevant enrollment.



Meals & Entertainment

- Enrollers shall provide for their own meals and entertainment expenses. Such expenses will not be reimbursed.



Cell Phone Expenses

- Enrollers are responsible for their cell phone expenses. Such expenses **will not be reimbursed.**



Shipping Personal and Business Related Articles

- All shipping to and from enrollment locations should utilize ground service to be eligible for reimbursement. Any priority shipments will not receive full reimbursement unless prior management approval has been obtained. Shipping via ground usually arrives at the destination 3 to 4 business days or less for a significant cost savings over priority shipments. Please note when shipping your personal belongings/luggage via UPS Ground Only shipping. The cap for reimbursement is \$75.00 each way on personal belongings/luggage. **To ship personal and business related articles you may request a label on our website at: www.enrollerinfo.com**
- If a label has not been provided, reimbursement for job related equipment/luggage shipping fees is allowable. Reimbursement for eligible expenses will be paid upon receipt of a completed expense report with all receipts via ExpenseWire.



Travel Day for Non-Local

- If you are required to travel more than 150 miles one way to the work location, GES will pay a \$100 travel compensation following the conclusion of your assignment and once all travel receipts have been submitted. The travel allowance is paid once per case. If travel is required to a single location for work involving multiple case assignments (such as enrolling via Birmingham Call Center), the travel allowance is paid only once at the end of your final assignment at this location.
- **NOTE:** Expenses incurred to GES outside the policies within this travel policy document may be recovered from the Non-Local Travel Day.



Payments

Individuals must sign up for direct deposit. This process can take 3 to 4 weeks to be completed and activated. **NOTE: Individuals with direct deposit paid to Business Entity are required to make change through Paymode Member Services at 877-443-6944.**