Policy: Travel and Expense Reimbursement

Policy Approval

Policy Owner(s):	**Phil Riley, SVP and Controller** **Ana Lenis, Sr. Director Business Services**	**Department:**	**Office of the Controller** **Business Operations Group**
Executive Sponsor:	**Scott Frisch**	**Department:**	**COO's Office**
Approved By:	**Scott Frisch**	**Date of Approval:**	**10/31/2024**

Purpose

To define the traveler's responsibilities in arranging business travel and for receiving reimbursement for eligible business expenses.

Policy

Business expenses will be reimbursed by AARP or paid by AARP (in the case of AARP Corporate Card charges), if expenses are:

- Reasonable
- Appropriately documented
- Consistent with policy, and
- Properly authorized and eligible for reimbursement

NOTE: Travelers are required to comply with AARP's policies, State and Federal laws and, if applicable, to comply with specific grant/contract requirements.

Consequences of Violations

AARP will not reimburse personal or unreasonable expenses. AARP reserves the right to pursue all legal remedies to recover its assets; including but not limited to restitution, civil recovery, and criminal prosecution.

Failure to comply with this policy will result in consequences including but not limited to the denial of a reimbursement request. Additionally, violation of this policy may result in disciplinary action up to and including termination.

Consequences for all employees, interns, affiliates, volunteers, and contingent labor are included in the table. Managers are responsible for their employees and non-employees travel compliance.

Who	Must
All Employees, Interns, and Affiliates	Comply with the policy.
Volunteers/Contingent Labor	Comply with the policy.

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Governance

This policy supersedes all previously published AARP Travel and Expense Reimbursement policies. Affiliates, business groups and/or approvers may impose additional requirements and controls over travel expenditures (i.e., some grant programs are required to use per diem as a condition of funding) and must not conflict with this policy. Specific departments may, at their discretion, impose greater control than required by this policy but not less.

This policy will be administered in compliance with the requirements of the Americans with Disabilities Act (ADA). Employees should work with their Human Resources Business Partner or Employee Relations if a travel accommodation is needed. Once approved by HR, the travel vendor will help obtain the required accommodations. Additional information can be obtained by accessing the HR Policies in Governance Central (access via InfoNet).

Employees, interns, volunteers, contingent labor, board members, and those who do business with AARP are expected to comply with the Code of Conduct, recognize and carry out their responsibility to uphold all applicable laws and regulations, and comply with all applicable policies, procedures, and guidelines. For more information, review the Code of Conduct.

Volunteers should also comply with the Volunteer Travel Policy Guidance which can be found on the Volunteer Portal (use the global search and type Volunteer Travel Policy Guidance).

Effective Date

January 1, 2025

Who is affected

This policy is applicable to all employees (including interns) of AARP and its affiliates. In addition, volunteers and contingent labor positions are also included under the purview of this policy.

Rationale

The underlying principles and intent of this policy must be applied to circumstances not specifically addressed. For situations not covered, they should be discussed in advance with the Senior Vice President and Controller (finance related), Sr. Director, Business Support Services (travel related) or their designee(s) for interpretation.

Compliance with the Travel Policy is mandatory. While it may be possible for a traveler to find less costly travel options by going outside of the designated travel vendor for an individual trip, the travel program is designed to benefit and protect AARP and all of our travelers.

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Terminology you need to know

Term	Definition
Traveler	Full-time, part-time employees, and interns, as well as non-employees such as contingent labor, and volunteers also referred to as "AARP Travelers or Travelers" in this document.
Business Traveler Accident (BTA) Insurance	Every employee, intern, board member and volunteer at AARP is automatically enrolled in the Business Travel Accident Insurance Plan (BTA). The BTA provides 24-hour protection while staff travel anywhere in the world on employer-related business. The BTA plan also provides limited medical treatment benefits. Additional information can be found in the AARP Employee Benefits section under Business Travel Accident Insurance on MyComp&Benefits. **NOTE 1:** Volunteer must be duly registered in the Volunteer Portal. **NOTE 2:** Contingent labor is not covered by the BTA. **NOTE 3:** BTA only covers approved business-related travel days.
International Insurance Travel	Travel outside of the United States and its territories.
Travel Vendor	Travel Management Company / AARP designated travel vendor.

Responsibilities of Employee Traveler

Employee travelers must spend AARP and its affiliates' funds prudently. If business objectives can be accomplished in a more economical way using video or audio conferencing, this medium should be used. Employees incurring expenses or authorizing non-employees to incur expenses must ensure the expenditure is for a valid business purpose and eligible for reimbursement.

Employee travelers must complete and adhere to the following:

- Obtain approved travel authorization from direct manager via Navigator prior to making any travel arrangements.
  - Travel authorizations are required whenever company-paid airfare, rail, hotel, and/or rental car are needed.
  - Travel authorizations are not required for day trips utilizing an employee's personal vehicle or for looking at travel cost estimates.

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Responsibilities of Employee Traveler, continued

- Use the designated travel vendor to make all airfare, rail, hotel, and rental car arrangements, except where specifically noted in this policy.
- Use the Travel Portal to book all standard domestic and international trips, with certain exceptions.
- Provide your approved travel authorization ID number as generated by Navigator for all travel bookings.
- Use Navigator for submitting travel authorizations, cash advance requests, and expense reimbursement requests for employees.
- Obtain itemized receipts for all purchases. Further information can be found in the "Receipts and Supporting Documentation" and "Governance" sections.
- Submit expense report within 10 days of incurring the expense when using personal funds, or within 10 days after the corporate credit card transaction is loaded in Navigator.
- List each expense as a separate line item in the expense report.
- Provide clear and accurate description for all expense submissions; be descriptive when entering business purpose for each expense.
- Complete required itemizations in Navigator.
- Attach necessary receipts in Navigator.
- Attach travel authorization and direct manager pre-approval for any exceptions with detailed justifications.
- Attach a copy of the travel vendor itinerary and the corresponding approved travel authorization to the expense report whenever company-paid airfare/rail, hotel, and/or rental car arrangements are booked as part of the travel.

NOTE 1: An employee traveler may delegate the preparation of their expense report, but it is strongly discouraged from delegating the submission and certification of the expenses. If an employee chooses to delegate the submission and certification of their expense report, the employee is still responsible and accountable for all the actions of the delegated individual.

NOTE 2: The travel authorization requires all estimated travel expenses (i.e., air/rail, hotel, ground transportation, rental car, meals, conference registration as applicable, etc.) before submission via Navigator. Estimated expenses can be viewed via AARP's Travel Portal before acquiring a travel authorization ID. Any exceptions to the travel policy must be noted in the comments section and supporting documentation must be attached (if applicable) to the travel authorization request and the expense report. Approval of the "Travel Authorization Request" must be completed in Navigator by the staff direct manager or their designee prior to booking any travel.

NOTE 3: All expense reimbursement payments to AARP employees will be processed by Automated Clearing House (ACH) direct deposit. It is the traveler's responsibility to ensure their Navigator profile has the required information to process the ACH payment if it is different from their payroll default account.

EXCEPTION: In situations such as group travel (10 or more) or very cumbersome trips (e.g., multiple cities for the same business trip), it is acceptable to book travel

via phone with an agent. Refer to the AARP Employee Travel Services InfoNet page for more information or additional training.

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Policy: Travel and Expense Reimbursement, Continued

Responsibilities of Volunteer Traveler

If AARP will be paying for a volunteer to travel, the most recent version of the Non-employee Travel Request must be completed (all required fields including accounting codes) and submitted to the travel vendor by an AARP employee.

Volunteer travelers are responsible for the following:

- Comply with the Volunteer Travel Guidance (Refer to pages 17-19).
- Submit expenses for reimbursement through the Volunteer Portal in a timely manner with specific timing guided by an individual State or Volunteer Program. Tip sheets and personal support is available for volunteers by contacting their program supervisor or the Volunteer Helpline at volunteer@aarp.org or 833-865-2277.
- Book travel with the designated travel vendor per the options below:

  Option 1: Using a Non-employee Travel Request, the volunteer can call the travel vendor directly to book air/rail (charged to the group's business unit and department number), but hotel and rental car will be charged to the traveler's personal credit card.

  - In certain situations, an AARP employee can pay for the volunteer's hotel room rate and tax and submit reimbursement through Navigator. The AARP employee must seek pre-approval from their direct manager.

  Option 2: Booking online using AARP's Travel Portal, the volunteer can create an e-profile and use a personal credit card. If using the online profile, whether associated with a non-employee form or not, all bookings air/rail/car and hotel reservation may be charged to the traveler's personal credit card.

The AARP employee authorizing their travel will need to manage the methods of reimbursement and ensure that only "out-of-pocket" expenses paid by the volunteer are reimbursed.

Responsibilities of Contingent Labor Traveler

If AARP is paying or reimbursing for contingent labor to travel, it is acceptable to use AARP's travel vendor to book their travel. If so, the most recent version of the Non-employee Travel Request must be completed (all required fields including accounting codes) and submitted to the travel vendor by the AARP contact/contract owner.

Contingent labor travelers are responsible for the following:

- Obtain pre-approval from AARP contact/contract owner.
- Contractor via MSA/SOW, who books directly with AARP designated travel vendor for pre-approved travel, should submit request for "out-of-pocket" expenses reimbursement to AARP via the invoicing process according to AARP's contract with their employer.

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Responsibilities of Contingent Labor Traveler, continued

- When permitted by their contract, contingent labor, who books directly with the designated travel vendor, should submit requests for expense reimbursement to AARP through the Contingent Labor System.
- Using the Non-employee Travel Request form, the contingent labor can call the travel vendor directly to book air/rail (charged to the group's business unit and department number), but hotel and rental car will be charged to the traveler's personal credit card.
    - In certain situations, an AARP employee can pay for the non-employee's hotel room rate and tax and submit reimbursement through Navigator. The AARP employee must seek pre-approval from their direct manager.

The AARP employee authorizing their travel will need to manage the methods of reimbursement and ensure that only "out-of-pocket" expenses paid by the non-employee are reimbursed.

NOTE: In situations where AARP is contractually responsible for providing travel services to vendors (Lifestyle Ambassadors, invited speakers, etc.), the department responsible for the contractual relationship must use AARP's travel vendor to request travel services.

This section is applicable to contractors hired via TAPFIN, MBO, or Master Services Agreement (MSA).

Responsibilities of Travel and Expense Approvers

Authorized approvers are responsible for the following:

- Protecting corporate assets and ensuring compliance with this policy.
- Being accountable for travel authorizations and expenses they approve.
- Ensuring approved travel and expense reimbursement requests comply with AARP's policy.
- Approving only allowable expenditures and declining unreasonable, inappropriate, or out-of-policy expenditures.
- Reviewing and approving expense reports within 5 business days of submission.
- Ensuring there is a travel authorization and that it is approved by the employee's direct manager or designee, even when not traveling for the home department.
- Reviewing the itinerary link as soon as received, promptly contacting and cancelling the trip with the travel vendor or requiring the traveler to cancel all bookings immediately if the travel was booked without approval and needs to be cancelled. When done within 24 hours of the trip being booked, unnecessary costs are avoided.
- Delegating approval authority is strongly discouraged. However, if the authorized approver does delegate responsibilities, the authorized approver will still be ultimately responsible and fully accountable for all delegated approvals.

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Responsibilities of Travel and Expense Approvers, continued

Authorized Approvers must obtain additional approval from their immediate manager through Navigator for invoiced expense items that benefit the Authorized Approver's needs. The Authorized Approver may not be the sole approver of an invoiced expense if they are a direct or indirect beneficiary. For example, if the Authorized Approver's department is invoiced for a conference, training, external business event, etc., which the Authorized Approver plans to attend, this invoice must be routed through Navigator to the Authorized Approver's immediate manager for further approval.

- For example, the type of expenses that require a higher level of approval includes but not limited to the following items: conference fees, training and other education expenses, professional license fees, other professional expenditures, etc.

NOTE 1: All expenses are subject to various levels of audit. Should an exception be noted, the approving manager will be contacted and is responsible for issues relating to the approval.

NOTE 2: Contact TravelServices (travelservices@aarp.org) for travel reports. Discrepancies with air travel expenses should be resolved directly with your Group Controller or Accounting Representative.

Travel

International Travel

When traveling internationally on behalf of AARP or its affiliates, it is mandatory that before booking any travel, the employee completes the International Opportunity Approval Form electronically via DocuSign, in addition to the travel authorization. Both forms must be attached to the travel expense report via Navigator.

International travel must have travel approver or manager approval, with final approval from the AARP VP International Affairs, SVP Global Thought Leadership, EVP & Chief Public Policy Officer, and the AARP EVP & Chief Operating Officer (COO).

ASI employees must also have the approval of ASI's President & Chief Executive Officer (CEO) and Chief Financial Officer (CFO). Travel should be limited to one person unless granted an exception by ASI's CEO and CFO.

AARP Foundation employees must also have the approval of AARP Foundation's President. Check  Foundation Travel and Expenses Addendum for specific policies applicable to Foundation staff. Link is only available to AARP Foundation staff.

All reservations must be made through AARP's travel vendor. Exceptions covered in this policy apply (e.g., booking directly with a conference hotel).

Employees are authorized to fly business class on international flights that exceed six (6) hours in duration, except when traveling within North America including Canada and Mexico.

It is the traveler's responsibility to ensure all required travel documentation is in place prior to travel, including a passport and entry visas. Check the International Travelers Checklist in the Employee Travel Services Infonet page for additional procedures.

NOTE 1: Flights to U.S. destinations that are longer than six (6) hours, including those to Alaska, Hawaii, Puerto Rico, & the U.S. Virgin Islands do not qualify for business class travel.

NOTE 2: International travel approval is required for Canada and Mexico.

NOTE 3: The International Opportunity Travel Form is intended for conferences or events. Please note that if the requester plans to perform their normal work duties internationally outside of the approved conference or event dates or while on non-AARP travel, this is considered a request to work outside of the U.S. which must be reviewed and have prior approval per the Flexible Work Arrangements (FWA) policy. Read the Appropriate Use of Computer Equipment policy for the full list of restricted locations where Computer Equipment cannot be taken, and the Flexible Work Arrangements (FWA) policy for guidance about working internationally.

NOTE 4: Travelers may take AARP issued devices to international destinations

except where prohibited by the Appropriate Use of Computer Equipment policy. Please refer to this policy for further guidance.

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Hotel and Lodging

For hotels, shown as "preferred" in the Travel Portal, the traveler should:

- Book a cost-effective hotel option listed as "preferred" in the Travel Portal within the hotel spending guideline for such city.
    - The travel portal will show an alert when a hotel surpasses the spending guideline. In such cases, the traveler must select a reason code for staying at the property and document in the expense report the business reason for selecting a rate beyond the spending guideline.

For non-preferred hotels:

- If the preferred hotel room rate surpasses the spending guideline for such city, it is acceptable to book via the Travel Portal a more cost-effective option even if it is not a preferred property.
- Look for cost beneficial options and take into consideration the need for ground transportation based on the location of the hotel.
- If there is no availability in the area at a preferred property and/or within the spending guideline, the travel vendor (online or via agent) will provide options at moderately priced hotels that will meet the traveler's business requirements. Refer to Booking Hotel Reservations for Individual Employees for additional options.
- All the above-mentioned must be documented in the travel expense report submitted in Navigator.

Hotels (preferred/non-preferred) with room rates higher than the spending guideline:

- It is at the direct manager's discretion whether to approve an increase in the expense if no reasonable options are provided within the spending guidelines (due to factors such as distance/time to the meeting, etc.). The additional cost and business reason must be documented in the expense report.

Airbnb, VRBO, Home Away, and other similar companies (rent by owner) are not approved vendors for hotel and lodging, and reimbursement for this type of lodging will not be approved.

Lodging charges for "concierge or executive" accommodations are not eligible for reimbursement.

EXCEPTION 1: For travelers attending conferences (including professional development conferences) or AARP sponsored group meetings, it is acceptable to stay at one of the hotels hosting the conference even if the rate exceeds the spending guidelines. In this case, the use of the travel vendor is not required and direct booking with the hotel/conference is permitted. The traveler is responsible to ensure the discounted/room block rate is booked. An approved Travel Authorization, including conference hotel, is required before booking.

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Hotel and Lodging, continued

EXCEPTION 2: For travelers attending local conferences or group meetings, it is acceptable to stay at one of the hotels hosting the conference or group meeting as long as the traveler's home address is a minimum of 50 miles from the conference/meeting site. An approved Travel Authorization, including conference hotel, is required before booking. For anything less than 50 miles, Executive Team member pre-approval is required. Follow this link for SCE approval authority for hotel stays that are less than 50 miles.

EXCEPTION 3: State Directors, AARP Events, and AARP Foundation staff are permitted to negotiate room blocks directly with hotels for events being planned in their State and/or on behalf of AARP. All invoices must follow the parameters outlined in the Procurement Policy. Please see PDF Foundation Travel and Expenses Addendum for specific policies applicable to Foundation staff. Please note that this link is only available to AARP Foundation staff.

If a hotel was not booked through the travel vendor, the reason must be documented in the expense report. Travel booked outside the travel vendor without an appropriate business reason that doesn't fall under the EXCEPTIONS listed above may not be approved for reimbursement. Written explanation for any exception to this policy must be noted directly on the hotel bill or in the comments section of the expense report. Failure to do so may result in the rejection of the expense report and reimbursement to the traveler.

Payment method(s) and requirements:

- Traveler can pay for hotel rooms with an AARP Corporate Card (if one has been assigned to them) or personal credit card and submit the invoice/bill for reimbursement.
- Direct billing of hotel expenses is not allowed. Employees can request a cash advance if circumstances prevent them from paying for the hotel room out-of-pocket.
- For all lodging expenses the itemized hotel bill must be submitted with the employee's expense report, regardless of the cost (nightly or aggregate). This is an IRS requirement.
  - Expenses related to lodging charges (room and room taxes) may be reported in aggregate (i.e., you may report the total of those charges and not report individual daily charges).
  - If the hotel bill lists other reimbursable expenses (e.g., meals charged to the room, parking, or internet access), those expenses must be itemized separately. That is one line for each expense on the expense report which should be supported by any required documentation.

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Hotel and Lodging, continued

Loyalty Rewards Programs: Travelers are permitted to join loyalty programs, and the benefits earned may be used by the traveler for personal use. Travelers may use personal loyalty rewards to upgrade their travel arrangements only if there is no additional cost to AARP. AARP does not reimburse for upgrades obtained through personal loyalty rewards programs. Priority should be given to AARP's preferred providers and a hotel property/chain should not be selected for the sole purpose of personal preferences or personal loyalty rewards programs.

NOTE 1: Federal Grant Funded Travel: Staff traveling under a federal grant should use the Travel Inc./Concur profile setting "Federal Grant Funded Travel". This will provide options for hotels within the government per diem. This option is ONLY for Federal Grant Funded Travel (i.e., some Foundation Programs).

NOTE 2: If a State Director has an established relationship with the hotel near the State office, please contact travelservices@aarp.org as they may be able to add the hotel to the travel program.

NOTE 3: Travelers should travel with some form of proof that they are eligible for the AARP rate (e.g., employee ID, membership card).

For more information see Travel Itinerary Changes and Cancelations.

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Privately-Owned Vehicles

Employees are permitted to use their personal car for business. Mileage will be reimbursed by AARP at the federal government's prevailing rate per mile, parking, (valet – when it is the only available option), and tolls are reimbursable, however gas is not reimbursable. It is the responsibility of the vehicle's owner to carry adequate insurance coverage for his or her protection, including personal effects, and the protection of any business passenger(s). Employees should check with their individual insurance companies if they have questions regarding coverage.

Travelers who use their personal cars for local ("around town") business trips will be reimbursed for mileage over and above their normal daily commute. Mileage reimbursement is based on the distance traveled excluding the daily commute. For instance, if the number of miles from your home/residence to your office (e.g., National Office, State Office, Lakewood, etc.) is 10 miles one way, and one day you attend an offsite meeting that is 40 miles (one way) from your home/residence; the distance should be calculated as follows:

EXAMPLE:

- Daily Commute: Home to office roundtrip = 20 miles
- Business Trip: Home to offsite meeting roundtrip = 80 miles
- Mileage Reimbursement: 80 - 20 = 60 miles (60 miles "above" the daily normal commute is the total mileage reimbursed)

When submitting for personal car mileage reimbursement, in the "Description Line", include the specific origin and destination address. If there is more than one destination, travelers must provide the specific address for each stop point in the order of the path traveled.

Weekend/Weeknight Events/Meetings: Upon direct manager's discretion, you may seek reimbursement for total mileage travel to/from home to event/meeting.

Commuting expenses from your residence to your assigned office location are not reimbursable during in-office or telecommuting days. Commuting expenses to offsite meetings scheduled during telecommuting days follow the reimbursement procedure and calculation as provided above.

The most economical mode of transportation should be used to travel between the employee's home/office and the airport/train station. A traveler can seek reimbursement if it is more economical to drive a vehicle and incur parking fees at the airport/train station. A traveler can seek mileage reimbursement when driven/picked up at airport/train station by someone else, provided it is more economical than other options. This choice should be documented in the expense report. Review the Procurement Policy list of Non- Eligible Expenses.

In the event of an accident, please see Section Car Rental Insurance and Reporting Accidents/Incidents for more information.

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Rental Car (U.S./ International) & Lease Program

Travelers may rent a car at their destination or for local travel when it is the least costly mode of transportation that is safe and time efficient.

Travelers must:

- Use the Travel Portal to book rental cars with preferred providers as designated in the Travel Portal for business-related travel.
- Rent compact to mid-size cars for individual travel or full-size for group travel.
- Decline additional insurance options for rental cars within the United States.
- Contact the office of Insurance Management immediately if a car incident happens while on business travel. Updated Car Rental Insurance Card is available on the Employee Travel Services InfoNet page and on the AARP LiveSafe mobile app.
- Elect to utilize the 'fuel service option' (prepaying for a full tank of gas) only if traveler reasonably expects to return the car with a near-empty tank. In the case where the 'fuel service option' is not elected, travelers should return the vehicle with a full tank of gas.
- Employees can pay for rental car charges with their AARP Corporate Card (if one has been assigned to them) or use their own personal credit card.
- Submit separate and/or itemized receipts for rental car and all rental car related expenses (e.g., fuel, parking, toll fee, valet – if this is the only available option) regardless of the amount. For instance, if there are different expenses such as 1) the rental car period, 2) fuel, 3) tolls; then the employee would need to submit one line per expense in the expense report in Navigator with their corresponding receipt.
- For international rental cars:
  - Book rental car using travel vendor.
  - Purchase of car insurance is required at the pick-up location.
  - Refer to AARP Travel Procedures and International Travel sections.

AARP will not reimburse and/or allow the following:

- Rental car or other services (e.g., charter buses) via ride share vendors (e.g., Lyft/Uber). Ride share vendors are only approved for ground transportation but not for rental car services.
- Car dealer rental.
- Rent by owner cars/car sharing.
- Other ground transportation (e.g., Lyft/Uber/taxi) costs incurred simultaneously during the rental car period. AARP may reimburse only if the combination of the rental car and ground transportation is the least costly method. In these situations, employees must provide documentation (receipts, price comparison, advanced direct manager approval, etc.).
- Direct billing from rental car companies to AARP is not allowed except under circumstances regarding long-term assignments or the Lease Program. Check the Non-Eligible Expense list in the Procurement Policy.

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Rental Car (U.S./ International) & Lease Program, continued

EXCEPTIONS:

- Renting cars larger than mid-size (for individual travel) or full-size (for group travel) is permitted only if approved in advance by the traveler's direct manager or their designee. Document your direct manager's pre-approval (email) with the business purpose and a list of the travelers. Attach the documentation to your expense report in Navigator.
- For employees on long-term assignments where a rental car has been approved, direct billing for rental car expenses is allowed. Refer to the AARP Employee Travel Services InfoNet page for more details.

Lease Program: AARP has a discounted agreement with National/Enterprise for large vehicle rental. Employees may rent large vehicles for short and long-term leases for business initiatives (e.g., vehicle wrapping). Refer to the short and long term vehicle rentals guide for more information. If you are unable to find availability with this vendor, please send an email to Travel Services at travelservices@aarp.org.

Common Carrier| Ground Transportation

Travelers have the option to select an alternative mode of transportation to meet their personal preference; however, the amount reimbursed by AARP may not exceed the non- refundable coach airfare for the same trip. The traveler is required to pay the difference between the price of the alternative mode of transportation and the equivalent coach fare if the alternative mode is higher. This difference should be deducted and not be claimed for reimbursement in Navigator. If the alternative travel choice is lower than the equivalent coach fare, AARP will only pay for actual expenses. Attach your cost analysis and manager's pre-approval to your expense report.

Employees may rent a car at their destination or for local travel when it is the least expensive mode of transportation and meets the minimum standards of safety and time efficiency. Volunteers are allowed to use rental cars for AARP business purposes when the reservation has been made by an AARP employee. Contractors may rent vehicles using the travel vendor, but it is the contractor's responsibility to add insurance during the rental period as they are not covered by AARP's BTA.

Receipts are required for reimbursement of taxi, ride share, shuttle, bus, or other ground transportation expenses of $75 or more for AARP ($25 or more for ASI, WOL, OATS, LCE, and the AARP Foundation).

Regardless of cost, the origin and destination address for ground transportation must be noted in the description section or on the attached receipts (e.g., Lyft ride from home (address) to Reagan Airport, taxi ride from Chicago O'Hare to Downtown Marriott Hotel, etc.). If an address is publicly available, enter the name of the location instead.

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- Offsite meetings when staff don't have a personal vehicle or when safety may be an issue: In certain cases, if staff is required to attend an offsite meeting and cannot reasonably do so by walking/biking/public transit, then the approval to take ground transportation (e.g., Lyft/Uber/Taxi) to and from the meeting is at the direct manager's discretion. This includes travel to/from the office, and to/from home depending on scheduling.

- Weekend/Weeknight Events/Meetings: Upon direct manager's discretion, you may seek reimbursement for ground transportation travel to/from home to event/meeting.

The most economical mode of transportation should be used to and from air, bus, and rail terminals whenever possible. Many major hotels provide transportation to and from airports free of charge. Public transportation and shuttle services should be considered and employees traveling to the same location should share ground transportation whenever possible.

Lyft Plus/UberXL/Ride Sharing services are not approved for general transportation except when distances or the number of people riding (3 or more) warrant the use. The names and organization of the additional riders must be included in the line description of the expense report.

Rental car services from ride share vendors and car dealers are not allowable. See Rental Car (US/ International) & Lease Program.

"Round Up and Donate" programs, where riders can opt in to have the app round up their fare to the nearest dollar, and automatically donate the difference to participating organizations, are not eligible for reimbursement.

Car services (e.g., sedan, limo services, black car service) are not approved for ground transportation.

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Air Travel

Travelers must:

- Use Travel Portal to purchase airline tickets for domestic and international travel.
- Book coach class tickets for domestic flights including Hawaii, U.S. Virgin Islands, Puerto Rico, Mexico, and Canada.
- Book non-refundable tickets both for domestic and international flights. Refer to International Travel and/or Non-Refundable Tickets section for more information.
- Pay out-of-pocket (non-reimbursable) for the additional cost incurred due to personal preferences:
    - Upgrade to business or first-class on a domestic flight, Mexico, and/or Canada.
        - The traveler must purchase the lowest fare offered and after the transaction is complete, contact the airline directly to upgrade the flight at the traveler's expense.
    - Preferred seating or boarding (e.g., Zone 1 boarding, economy plus-expanded legroom) in the coach cabin, and airline/hotel club memberships, etc.
    - The traveler may choose to upgrade a seat after booking their travel by calling the airline, or using the airline's website/app, and paying for the upgrade personally.
    - The traveler is responsible for all fees paid for personal preferences, even if a business trip gets cancelled/changed and the traveler no longer travels. AARP is not responsible for non-refundable fees paid by the traveler for upgrades or any type of personal travel preference. If a delegate books on behalf of the traveler, and pays for an upgrade, the traveler is still responsible for the cost.
    - Any fees associated with these preferences are not eligible for reimbursement.

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Air Travel, continued

For preferred airlines, shown as "preferred" in the Travel Portal, the traveler should:

- Book the most cost-effective option listed as preferred in the Travel Portal in line with the business needs.
    - The Travel Portal will show an alert when the ticket selected surpasses the "acceptable" threshold for fare difference. In such case, the traveler must select a reason code for choosing that ticket and document in the expense report the business reason for booking a ticket beyond the threshold.

For non-preferred airlines:
If the preferred airlines don't offer a cost-effective option, it is acceptable to book a more cost effective non-preferred airline via the Travel Portal. If this is the case, the traveler must document and explain the option selected when submitting the expense report in Navigator.

Reservations should be made as early as possible to receive the maximum advance purchase discounts. Significant air fare savings are possible with a 14-day (or more) advance purchase.

AARP supports the following reasonable business travel parameters for its travelers:

- Departure and arrival times: AARP does not expect individuals to travel at extreme times either early in the morning or late in the evening to secure the least costly travel options. Day before travel or day after travel is an acceptable business reason if an early meeting is expected the next day or if a meeting is scheduled to run late. It is at the direct manager's discretion to approve. Discuss with your direct manager prior to making final travel arrangements.

- Locations: AARP does not expect travelers to take flights that have stops in locations that are not directionally appropriate to secure the least costly travel options. For instance, when flying from D.C. to Lakewood, a stop in Phoenix would be appropriate but a stop in Boston would not.

- Travelers should not select flights for the sole purpose of selecting an airline with which they prefer to fly and/or due to personal loyalty rewards programs.

- Number of Stops: AARP does not expect travelers to take flights that have an unreasonable number of stops to secure the least costly travel option.

Continued on next page

Air Travel, continued

Loyalty Rewards Programs: Travelers are permitted to join loyalty programs, and the benefits earned may be used by the traveler for personal use. Travelers may use personal loyalty rewards to upgrade their travel arrangements only if there is no additional cost to AARP. AARP does not reimburse for upgrades obtained through personal loyalty rewards programs. Priority should be given to AARP's preferred providers and an airfare should not be selected for the sole purpose of personal preferences or personal loyalty rewards programs.

Payment method:
Airfare will be charged to the traveler's business unit/department and paid directly by AARP. Direct managers are responsible for reviewing airfare expenses charged to their business unit.

Rail Travel

Travelers must:

- Use Travel Portal to book rail.
- Select the lowest-priced option. Those traveling between D.C. and the northeast corridor (e.g., New York, Boston, etc.) can book Acela in the coach cabin unless the upgrade to first class is at no additional cost to AARP.

EXCEPTION: Business Class on a Regional train is acceptable when Acela is more expensive. Document respectively in the expense report if business class on a Regional train is booked.

Expense Reimbursement

Travel (Cash) Advances

It is the general policy of AARP that employees are eligible to receive travel advances up to $750 for domestic travel and $800 for international travel, if approved by the direct manager or his/her approval designee.

A travel advance is available to authorized employees who submit a cash advance request via Navigator at least five (5) business days prior to the travel. However, travelers who have an AARP Corporate Card or who had an AARP Corporate Card revoked are not permitted to receive a cash advance.

IRS regulations require that tax be levied on any travel advance outstanding after 90 days.

Requests for additional travel advances or expense reimbursements will not be processed for any employee with an outstanding travel advance from a previous trip. Accounts Payable will notify the employee if a travel advance request is denied.

Cash advances are not available for non-employees.

See the Navigator: Travel and Expense Quick Reference Guides InfoNet page for information on how to submit a cash advance request.

Use of AARP Corporate Card

If the employee has an AARP Corporate Card, the employee can use this card for most business expenses, or cash if needed for small expenses such as hotel tips. If the employee does not have an AARP Corporate Card, the employee is expected to use their own personal credit card(s) to pay for all AARP business travel related expenses outside of air and rail. It is the responsibility of employees to save their original itemized receipts for submission with the expense report.

Non-employees must use their personal credit card for authorized expenses that need reimbursement, unless as specified in the "Responsibilities of Non-employee" section .

Travelers will not be reimbursed for credit card fees associated with annual membership fees, interest charges, and fees imposed by the credit card company for late payments. This applies to AARP-provided as well as personal credit cards. Employees should send AARP Corporate Card late fee payments directly to the corporate credit card company.

Refer to the AARP Payment Card Policy for more information on who should apply for an AARP Corporate Card and policies on the use of it.

EXCEPTION: International transaction fees will be reimbursed for employees while on approved international travel.

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Expense Reimbursement, Continued

Receipts and Supporting Documentation

For business expenses of $75 or more for AARP ($25 or more for ASI, WOL, OATS, LCE, and the AARP Foundation) it is mandatory that copies of receipts and other supporting documentation must be submitted with the expense report. Printout of a personal credit /AARP Corporate Card transaction detail is not acceptable.

The following expenses require detailed/itemized receipts that show proof of payment and supporting documentation regardless of the amount:

- Rental cars and related expenses
- AARP owned vehicles
- Lodging and related expenses
- Meals with alcohol
- Alcoholic beverages
- Other receipts as requested by approver or as part of a Business Unit requirement

Failure to provide itemized/detailed receipts when required is considered an exception to policy and must be documented in the comments section of the expense report. The authorized approver must specifically acknowledge the exception to policy by documenting it on the comment section prior to approving the expense report. Failure to specifically approve a policy exception will result in the return of the expense report to the traveler and a potential delay in or rejection of the reimbursement.

Meals

AARP Travelers should purchase meals that are reasonably priced. It is expected that staff will be cognizant of meal expenses and spend an appropriate amount. Spending Guidelines are for average meal rates based on current travel data and will be updated when applicable.

Meals of $75 or more for AARP ($25 or more for ASI, WOL, OATS, LCE, and the AARP Foundation) require an itemized receipt submitted through Navigator.

The itemized receipt must include the name and location of the restaurant, a description of the items ordered, date, and total amount of the expense (including tips). The signed copy of the receipt is also required if applicable (e.g., when it includes a tip).

Alcohol must be listed separately as “alcohol expense” in the expense report in Navigator. Refer to Alcohol Beverages for additional information related to expenses for alcoholic beverages served in conjunction with staff or business meals.

It is highly suggested to use restaurants in the Dinova network for business meals. AARP has teamed up with Dinova to save money on business dining. Further information on the Employee Travel Services page on InfoNet.

Continued on next page

Meals, continued

Business Purpose & Description - For all expenses, an overall business purpose must be selected from the pull-down menu in Navigator. Additional information regarding the purpose of the related discussion/meeting is to be included in the description box when entering the individual expense line item.

EXAMPLE: "Discussed the ABC Project/Dinner," "Discussed Year-End Planning/Lunch," "Interviewed Candidate/Breakfast, etc.". Descriptions including generic terms such as "Meeting with consultants," "Dinner with staff," etc. are unacceptable and will not be approved.

There are four types of meals that can be selected when submitting expenses in Navigator, as follows:

Meal	Description
Business	This category of expenses is for meals with staff, non-AARP colleagues or contractors/vendors, etc. during which specific business discussions/activities are held. **NOTE:** For this category only, reimbursements for business meals must be submitted by the most senior ranking employee in attendance or the most senior ranking meeting host (when attendees from different groups participate). The full names of all attendees, their company, and title must be provided. Unless it is a meal for two colleagues on the same business travel, the expense report also needs to document the specific business discussion/activities generating the expense. The preferred method is to list them in the electronic expense report; however, the list may be documented on the attached receipt.
Self	This category of expenses is for meals for individual staff dining alone. Please select one of the other meal categories if you are submitting expenses for you and at least one other person.
Catered	This category of expense is for catered meals with six (6) or more participants provided in the office or location other than a restaurant or at a specific external event which is not held at a restaurant, i.e., Awards Dinner at Hotel. Specific names are not required; however, a clear description of the purpose along with a general number and relationship of attendees must be provided. **EXAMPLE**: "Pizza/working Saturday/15 marketing staff", or "Volunteer of the Year Award/47 State volunteers/Marriott Hotel." **NOTE:** If it is a catered meal, but there are five or fewer attendees or the meal is held at a restaurant, the expense should be submitted under "Meals – Business" and follow the guidance in Business Meals.

External Meeting	This category of expense is related to events/activities held outside of office location that includes meals and/or event/meeting space with staff, non-AARP colleagues or contractors/vendors, etc. Specific names are not required; however, a clear description of the purpose along with a general description of attendees must be provided. **EXAMPLE**: "Event and catering for team building of Marketing Team at DC Puttery. Please see attached documents." Or "Volunteer Recognition event, space rental and catering, at Grand Hyatt with volunteers, staff, and contractors".

Continued on next page

Expense Reimbursement, Continued

Meals, continued

Meal	Description
Volunteers	This category is proprietary for certain programs only – please do not use this category unless specifically authorized by management. Approvers/delegates of authorized volunteer expenses are responsible for ensuring compliance in accordance with this policy.

Meals during training/conference (local or not) are acceptable - only when not included in the training/conference package and are at the direct manager's discretion to approve. Discuss with your direct manager prior to incurring the expense.

Direct managers are expected to monitor both individual/staff only meals and business meals to ensure that employee expenses are appropriate. Direct managers have the authority to decline expenses that are not in compliance with policy.

Alcohol Beverages

AARP and its affiliates may cover the cost of alcoholic beverages in conjunction with an AARP meal or event (i.e., Holiday Party, Team Building Activity), provided that quantities are reasonable, costs are moderate, and all staff and volunteers exercise prudence and good judgement. Check with your department for any internal policies regarding more restrictive alcohol reimbursement guidelines.

AARP Foundation employees are permitted to request reimbursement for moderately priced beverages for staff on travel for the Foundation if the alcohol is purchased with unrestricted funding. Please see Foundation Travel and Expenses Addendum for specific policies applicable to Foundation staff. Please note that this link is only available to AARP Foundation staff. Under no circumstances may alcoholic beverages be purchased with Federal, State, or private grants funds or any donor restricted funds. It is the responsibility of AARP Foundation's expense approver to ensure that alcohol reimbursement requests are submitted under appropriate funding costs.

Employees are required to submit itemized receipts that include alcohol and proof of payment, regardless of the amount.

Alcohol expenses will be reimbursed only in conjunction with a business meal, when entertaining AARP guests, for a staff-related activity, for meals while on business travel, or at an official AARP meeting/event.

Charges for alcohol must be indicated on the expense report. Do this by entering the total meal expense and then choosing the itemize function to separate the charge into two parts: meal and alcohol.

All staff and non-employees are expected to follow these policy guidelines whenever alcoholic beverages are included in an AARP business dinner or event.

Abuse of the alcohol policy will result in disciplinary action, up to and including termination.

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Expense Reimbursement, Continued

Alcohol Beverages, continued

When planning large group dinners, defined as 10 or more attendees, and events where alcohol will be served at an AARP location or other location; the quantity and cost should be clearly indicated in the catering order/contract. Written advance approvals from the direct manager and group's Executive Team member are required and must be submitted with the expense report. See your department's detailed guidance for additional (stricter) alcohol policies.

EXCEPTION 1: When entertaining clients (existing or prospective) or providers, ASI may cover the cost of alcoholic beverages – not in conjunction with a meal - provided that quantities are reasonable, costs are moderate, and all attendees exercise prudence and good judgement.

EXCEPTION 2: Follow this link for SCE approval authority for alcohol purchases

Both exemptions above must comply with providing additional information in Navigator regarding the purpose of the related discussion/meeting which needs to be included in the description box when entering the individual expense line item.

EXAMPLE: "Discussed the ABC Project," "Discussed Year-End Planning". Descriptions including generic terms such as "Meeting with consultants," "Dinner with staff," etc. are unacceptable and will not be approved.

Personal Expenses

Personal expenses related to extending an approved business trip (i.e., days added to the beginning or end of a business trip) are the responsibility of the traveler and must be excluded from the expense reimbursement submission. This includes additional hotel, meals, additional airfare cost (i.e., resulting from extending the trip), internet expenses and/or rental car days.

A breakdown of the cost separating business from personal and how the personal portion was determined should be documented. Documentation can be done by attaching a document or by explaining the details in the comment section of each expense line item.

AARP will not reimburse personal expenses and reserves the right to pursue all legal remedies to recover its assets.

Personal travel can be added or booked via the travel vendor, but the booking must be done over the phone with an agent and paid for with a personal credit card. The call-in fee will be charged to the personal credit card. Personal travel cannot be booked via the online Travel Portal nor charged to the AARP master billing, or an AARP Corporate Card.

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EXCEPTION: If the cost of adding the personal segment in the business travel itinerary is the same or less than the cost of the business itinerary (without the personal segment), it is acceptable to book in the travel portal directly, with direct manager pre-approval. The expense report must be documented with the cost analysis of both itineraries which should be done close to the time of booking.

Upon direct manager's discretion, arriving the day before an early meeting, may not be considered extending a business trip. Staying an additional night after a late meeting is not considered extending a business trip. Add notes or calendar print out when submitting your expense report.

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Expense Reimbursement, Continued

Other Expenses

Expense	Description
Internet Access Charges	The cost of internet access for business purposes during business travel is eligible for reimbursement. Documentation for this expense should be clearly noted on the hotel or internet provider's invoice, which must be submitted in the expense report. The itemized hotel bill and proof of payment must be submitted in the expense report. **NOTE:** For specific questions related to FWA – Internet Charges, refer to HR's Flexible Work Arrangement.
Laundry	Laundry charges are eligible for reimbursement for business trips of more than five (5) consecutive days.
Tip and Gratuities	Tips and gratuities for meals, Uber/Lyft/taxi, service providers etc. are allowable expenses at the normal (15% to 20%) rate. For other tipping guidelines please see Exhibit A Spending Guidelines. **NOTE:** Authorized approvers have the responsibility to deny reimbursement for excessive gratuities.
Telephone	Employees are encouraged to use AARP Mobile Devices to avoid hotel telephone charges. To obtain a cell phone, please reference the AARP Mobile Devices site and order your mobile device through the Calero Portal. For International Travel: The traveler is required to set-up their work phone at least two weeks in advance of departure for international calling and data plan to avoid excessive roaming charges. This can be done by calling Calero 1-855-784-5398. Please refer to the Appropriate Use Computer Equipment Policy for further guidance.

Continued on next page

Other Expenses, continued

Expense	Description
Gift Cards	AARP will not reimburse or pay for gift cards for employees. Please refer to the Code of Conduct for further information regarding gifts. Recognition points are a valuable way to reinforce employee performance and to provide appreciation in a timely manner. For such opportunities, managers should utilize the HR: AARP Recognizes You program. Refer to Non-eligible expenses in the Procurement Policy.

Staff Activities/Offsite
Managers will be reimbursed for modest and reasonable costs associated with staff activities held outside the office intended to build camaraderie and foster teamwork. Any alcohol consumed as part of a staff activity must be in compliance with the guidelines of the Alcohol Beverages section.

These activities should occur on an infrequent basis. Managers are responsible for acting as prudent stewards of AARP's financial resources by seeking low-cost outside activities for this purpose such as a baseball game or hosting an event at a local park or a museum.

These staff activities should occur within the local area of staff's assigned work function, i.e., staff in Washington, DC should plan to meet in the Greater Washington, D.C. Metro area. If these types of staff activities require travel outside of the local work area, then pre-approval is required from the AARP COO. For example, staff located in Washington, D.C. planning a staff activity in Florida would need to get pre-approval from the AARP COO. This applies to AARP and all AARP affiliates.

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Expense Reimbursement, Continued

Non-eligible Expenses

It is the responsibility of authorized approvers, delegates, and travelers to adhere to the Procurement Policy list of non-eligible expenses. The list consists of expense items that will not be reimbursed or paid by AARP and is not limited only to the items on the list.

Authorized approvers and delegates are responsible for ensuring that expenses are reasonable and appropriate, and to reject reimbursement requests that are not in accordance with the policy.

Commuting Cost

AARP does not reimburse for commuting costs between an employee's home and their position's assigned work location. More guidance regarding how a position's work location is assigned may be found at AARP Position Location Guidelines.

Offsite Temporary Assignments

AARP will reimburse employees for reasonable expenses related to temporary assignments that involve working for extended periods at a location other than an employee's home location of record and their assigned position location.

Travelers on long term assignments should consider cost effective long-stay options. Long-stay properties may require a lease agreement depending on the length and/or cost of the total stay. In these situations, the traveler needs to work with Procurement on the contract review and signature process.

It is also acceptable for the traveler to find a long-stay property (that it is not rent by owner type as stated in Hotel and Lodging section) as long as pricing is within the spending guideline, stay is between 7-30 consecutive days (depends on the property), and it is more cost effective than a hotel. Long-stay properties can be found in the Travel Portal and priority should be given to those labeled as "preferred" in the Travel Portal. Corporate housing is applicable for stays over 30 consecutive days and a lease may be required. The Procurement process must be followed if a lease is required. Some requirements such as the number of days and/or lease depend on the property. Contact travelservices@aarp.org for questions and/or options for long-stay.

Please see Foundation Travel and Expenses Addendum.pdf for specific policies applicable to Foundation staff.

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Offsite Temporary Assignments, continued

Reimbursement guidelines are based on the length of the temporary assignment:

7 days - 4 weeks:

1. Airfare/Transportation to and from assignment location and home base
2. Daily living allowance (e.g., meals, ground transportation, miscellaneous as determined by Department/Manager)
3. Public transportation when available; otherwise, with authorization, rental car, or personal car for approved business travel
4. Preferred-rate hotel/long-stay property

4-5 weeks:

5. Items 1-3 listed above for 7 days – 4 weeks, plus;
2. One week in preferred-rate hotel (to locate corporate housing)
3. Furnished corporate housing or long-stay property

6-8 weeks:

1. All items listed above for 4-5 weeks, plus;
2. Reimbursement for one trip home every third weekend during the assignment. Reimbursement will cover reasonable and actual expenses up to the cost of a round-trip coach class airfare.

More than 8 weeks:

1. All items listed above, plus;
2. Eligible family members may accompany the employee at the new location. The employee's spouse/domestic partner is not eligible for daily living allowance.
3. If approved dependents do not accompany the employee, the employee will be reimbursed for a weekend trip to their home location at the end of every third week of the assignment. Exceptions should be discussed on a case-by-case basis with the direct manager.
4. Alternatively, the employee's spouse or domestic partner may visit the assignment location. Reimbursement will cover reasonable and actual expenses, up to the cost of a round-trip coach class airfare. Other spousal or domestic partner expenses will not be reimbursed.

NOTE: Temporary assignments should not exceed 9 months unless approval is obtained by HR, OGC, Finance, and Executive Team Member.

EXEMPTION: If the frequency of the trips or the length of the hotel stay is different from what is specified here but the cost of choosing a different option is more beneficial, the traveler's SVP can review the cost analysis and approve this exemption. The traveler must document the cost analysis together with the Letter of Agreement (LOA) with their interim manager. Additionally, proof of SVP approval must be included in all the expense reports associated with the interim assignment.

Travel Procedures

Travel Profile

A Travel Profile is required for all employees expecting to travel, all managers who approve travel, and all designees who book travel. Travel Profiles are created and maintained within AARP's Travel Portal. The employee is responsible for creating and maintaining a travel profile in the Travel Portal. The profile includes information such as: emergency contact information, credit card information, and optional information that may help the travel vendor in arranging travel services.

Pre-Trip Travel Authorization

AARP employees are required to submit and obtain from their direct manager (or delegate) an approved travel authorization via Navigator prior to arranging travel with the designated travel vendor. See section Responsibilities of Employee Traveler for more information.

Travel Itinerary Changes and Cancelations

To manage itinerary change fees the following applies to permissible additional costs:

- If a meeting ends earlier and your flight is scheduled to depart in more than 5 hours, AARP will pay for the cost difference.
- Meeting dates changing after booking but prior to travel. In this situation, submit a new travel authorization with the new dates and change itinerary immediately after the travel authorization is approved. Please be aware that providers may charge a change fee in addition to the difference in the cost of the ticket initially purchased. Most hotels allow for a 48 to 72-hour cancelation without penalty; however, it is the traveler's responsibility to know the hotel's cancelation policy as each hotel is different. Make changes for hotel and air directly in the travel portal, unless the system gives you an error message (sometimes certain tickets or hotels have penalties, and these would need to be addressed via an agent).
- Travelers should contact the travel vendor via phone/agent:
  - For all train changes booked with the travel vendor as changes cannot be done through the Travel Portal.
  - To make itinerary changes for travel arrangements originally booked through the travel vendor that can't be done via the Travel Portal.

There are usually additional costs incurred by the business unit if travel is not cancelled in a timely manner. The traveler is responsible for making changes as soon as they are aware there is going to be a change due to business reasons. Most reservations made online can be cancelled online or by phone. If a traveler cancels or changes the trip for a personal matter or personal preference, they are responsible for reimbursing AARP for any fee associated with the cancellation or changes. If a delegate books on behalf of the traveler, the traveler is still responsible for the cost. Unless there is a circumstance outside the traveler's control, costs incurred as "no show" are not reimbursable.

If for any reason an airline ticket is not going to be used, the traveler must contact the travel vendor to cancel or reschedule the flight prior to the original departure date. Generally, if a ticket is cancelled at least 72 hours before departure it will retain its value for up to one year. Travelers should make every effort to use the value of the ticket within the allowable year.

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Travel Itinerary Changes and Cancelations, continued

Changes are discouraged as they may generate additional expenses billable to the traveler's department, but if there is a valid reason for the change, written pre-approval by direct manager is required and should be included in the expense report.

It is the traveler's responsibility to notify the travel vendor to cancel a room reservation prior to the cancellation time, if booked through the travel vendor or directly with the hotel if it is part of a room block/conference. Most hotels have a 48 to 72-hour cancellation period. It is the traveler's responsibility to check the cancelation policy and make any changes in accordance with the individual hotel's policy to avoid any unnecessary fees.

Travelers are reminded that cancellation deadlines are based on local time of the destination hotel. Timely and confirmed cancellation will avoid no-show charges as all hotel reservations are guaranteed. If the reservation is not cancelled, a no-show charge may be assessed. It is at the direct manager's discretion whether to approve or deny reimbursement requests for no-show charges due to business reason or uncontrollable factors (e.g., flight cancellation due to weather).

Non-Refundable Tickets

Travelers are expected to travel on non-refundable airline tickets whenever available to help reduce travel costs. While these tickets are non-transferable, they are in most circumstances re-usable up to one year and can be applied to the traveler's next trip if the same airline is used. The travel vendor tracks all unused tickets and provides quarterly reports to the Travel Services Team. Travelers will find their unused tickets posted on their personal Travel Portal under the tab "Unused Tickets". The travel vendor will automatically apply the unused ticket (when terms are applicable) the next time reservations are made.

Employees also get email notifications about unused tickets. Always cancel prior to 72 hours in order not to lose the full value of your ticket

It is at the discretion of the Travel Services Team to apply unused tickets/credits that are expiring to other traveler's airfare to minimize financial losses.

Emergencies

In emergency situations, travelers may contact the travel vendor for assistance.
If it is essential to purchase travel from another vendor(s), coordinate with the direct manager on a case-by-case basis prior to the purchase, explain the deviation from the AARP policy in writing after the travel, secure approval from the same level of approval authority as the travel authorization or International Travel Opportunity Approval Form, include the explanation in the expense reimbursement submission together with the receipts. Failure to provide such authorization will result in the return of the expense report to the traveler and a potential delay in processing reimbursement.

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Rental Car Insurance and Reporting Accidents/ Incidents

AARP's auto insurance policy provides full coverage for business rental cars. When signing a rental car agreement, the employee should decline all additional insurance, including collision damage waiver and personal accident coverage when renting automobiles for business travel. It is the renter's responsibility to have a copy of the insurance card with them when picking up and dropping off the rental car. The latest insurance card can be found in the Employee Travel Services page, and within the LiveSafe app.

Reporting Accidents/Incidents

In the event of an auto accident, vehicle theft, incident, or vandalism resulting in damage to the rental car:

1. Immediately notify your direct manager and AARP Insurance Management office (see contacts in Appendix C) of the accident/incident.
2. All accidents/incidents must be reported within 48 hours of its occurrence.
3. File an auto accident report with the AARP Insurance Management office within 48 hours of its occurrence, if possible.
4. Collect all information necessary at the accident scene; take pictures of the vehicle. Obtain the names of any witnesses and file a police report for the accident, if appropriate.

Reporting employee injuries due to the auto accident

If an employee is injured because of an automobile accident while on business travel:

1. Seek immediate medical attention.
2. The employee must notify their direct manager.
3. The employee's supervisor must call PMA Companies to report that the employee was injured on business travel (see contacts in Appendix C).
4. AARP's workers compensation claims administrator will manage the employees' claim, pay for medical costs, and provide all appropriate benefits to the employee, in accordance with labor code of the State where the accident occurred.

NOTE 1: Employees should maintain copies of documentation (e.g., police report, etc.).

NOTE 2: All travelers are responsible to check the car for any dents, scratches, gas tank, spare tire back-up, etc. before leaving the rental lot at the time of pick-up. The traveler is responsible to report directly to the rental car company any issues found with the vehicle at the time of pick-up. This is to avoid any issues that didn't happen during the rental period for which the traveler should not be responsible for.

Group Travel

Group Travel is when ten or more individuals are traveling to the same destination for the same meeting or event. Group travel must be approved by the appropriate Executive Team member or designee. Group Travel processes can be found on the Employee Travel Services page. Contact the AARP Travelservices@aarp.org Team for guidance on this mandatory process.

Appendix A

Spending Guidelines

AARP does not follow per diem practices. The following table provides suggested spending guidelines for employees. AARP will pay for actual expenses. However, employees are expected to exercise good judgement. Supervisors may choose to deny approval of expenses deemed excessive or unreasonable. Rates don't include applicable taxes and tips (as appropriate).

Category	Guideline	Comments
Travel Mileage Rate	Based on the effective IRS rate and subject to change. Check the Employee Travel Services InfoNet Page for the latest reimbursement rate.	This standard mileage rate is based on an annual study by the GSA of the fixed and variable costs of operating an automobile and includes such items as depreciation [or lease payments], maintenance and repairs, tires, gasoline [including all taxes thereon], oil, insurance, and license/registration fees.
Rental Car Rate	$46	Average daily cost of a mid-sized rental does not include taxes and surcharges.
Meals	Breakfast $20 Lunch $40 Dinner $75	Average per day including meals, alcohol, tax, and tip. Refer to Alcohol Beverages for acceptable reimbursement situations. Costs may be higher in high-cost cities.
Hotels	See Appendix B for the specific hotel rates spending guideline for your destination city.	Please check the Travel Portal for examples of appropriate mid-priced Preferred Hotels/Chains.
Other tipping guidelines – Skycap – Housekeeping – Bell cap – Parking attendants	 $3 per day $4 per day $3 per bag $4 per day	This represents the maximum reimbursable gratuity (if appropriate).

Appendix B

2025 Preferred Hotel & Chain List | Hotel Rates Guideline

2025 Preferred Hotels:
The Travel Portal displays "preferred" hotels available based on the search criteria. For long-stay, Suite Solutions is also a preferred vendor. Contact Travel Services for more information.

AARP Membership chainwide agreements that offer hotels at discounted rates are also displayed as "preferred" in the Travel Portal.

Hotel Rates Guideline in the table below show:

- Spending Guidelines are based on Top Visited Cities by AARP Business Travelers in 2024.
- Cities not listed in the table below are suggested at $225 per industry rates (excluding applicable taxes).
- All hotel spending guidelines listed in Appendix B relate to room rate and don't include applicable taxes.

City, State	2025 Spending Guideline
Albany, NY	$ 250
Atlanta, GA	$ 250
Austin, TX	$ 250
Boston, MA	$ 325
Chicago, IL	$ 270
Colorado Springs, CO	$ 225
Denver, CO	$ 250
Las Vegas, NV	$ 275
Long Beach, CA	$ 285
Los Angeles, CA	$ 250
Memphis, TN	$ 250
Miami, FL	$ 250
Nashville, TN	$ 250
New York City, NY	$ 400
Orlando, FL	$ 225
Philadelphia, PA	$ 225
Sacramento, CA	$ 225
San Diego, CA	$ 300
San Francisco, CA	$ 375
San Juan, PR	$ 285
Seattle, WA	$ 250
Tallahassee, FL	$ 235
Tampa, FL	$ 250
Washington, DC	$ 375

Appendix C

Contacts

Important contacts are listed in the table below:

Policy Topic	Point of Contact
Finance	Senior Vice President and Controller Ap-help@aarp.org
Travel	Sr. Director, Business Support Services Travelservices@aarp.org
International Travel	Business Operations Associate, International Travel internationaltravel@aarp.org
Procurement	PCardExceptionRequest@aarp.org
Insurance	Lisa Hilton Director, Insurance Management Lakewood, CA Office 387 562-496-5206 LHilton@aarp.org PMA Companies – Workers Compensation 888-476-2669 and reference account number 1432293
Calero	1. Go to the Calero portal: https://fedlinks.int.aarp.org/calero 2. Click Open Chat from the Support menu. 3. Enter your name and your AARP email address. 4. Click the Chat Now button to chat live with a Calero representative.
Travel Incorporated Agents	AARP.Travel@Travelinc.com (Employee Booking related requests or questions) Opssupport@Travelinc.com (Non-Employee Travel Bookings) 800-952-1950 (Domestic Travel) 470-655-3895 (International Travel)
Online Tech Support for Travel Incorporated	866-738-6444
Group & Meetings Travel	888-357-8218 GTPcorporate@travelinc.com
Volunteer Helpline	volunteer@aarp.org 833-865-2277
Treasury	Corporate Credit Cards Questions - corporatecreditcards@aarp.org