

NCSMA Reimbursement Guidelines – Effective 03.2026

A budget is approved annually by the House of Delegates for NCSMA operating expenses. The NCSMA Budget year is from convention to convention. Expenses incurred by an officer or committee will be expensed to the budget year in which they served. Officers and committees are expected to work within the amount budgeted for their office/committee. It is the responsibility of the officer or committee chair to know the amount budgeted for their position/committee and to keep an accurate account of the amount available for their use. The Treasurer may be consulted if there is a question regarding the budget amount or the remaining balance. Any discrepancies should be brought to the attention of the NCSMA Treasurer as soon as they are noticed for resolution. Any officer or committee chair who feels the budgeted amounts are inadequate may submit their recommendation to the Budget and Finance Committee for consideration in the upcoming budget year. Anticipated expenses that will be over the budgeted amount should be brought to the attention of the Board of Directors (BOD) or Executive Council for approval before the expenses being incurred.

Reimbursable expenses will be paid within the limits established by the Internal Revenue Service and the Board of Directors. Completed expense vouchers approved first by the Committee Chair or officer, along with supporting documentation, including required documentation, are forwarded to the President-Elect and then the President for their approval before being forwarded to the Treasurer for payment. Vouchers may be submitted electronically. Non-budgeted items approved by the BOD should have an expense voucher completed and be authorized by the President-Elect and President before reimbursement is made unless the Board has otherwise directed the Treasurer to pay directly for the approved expense. Any questions regarding the expenses should be resolved prior to payment. A blank or incomplete voucher should **never** be approved or paid. Over-budgeted items should be brought to the attention of the BOD for approval before they are paid. Vouchers must be submitted within sixty (60) days from the date the expense is incurred. Vouchers submitted after this deadline must be approved by the BOD before they are paid.

All submitted expenses are subject to review by the President and President-Elect to ensure compliance with these guidelines. Every effort is made to process the vouchers promptly. Vouchers with discrepancies/questions/non-eligible expenses will be brought to the attention of the requestor by the President or President-Elect as soon as known for clarification. Discrepancies **MUST** be resolved before reimbursement **and may be brought before the Board of Directors for a resolution if necessary.**

Expenses eligible for reimbursement:

(Reimbursement guidelines for Delegates/Alternates to the AAMA HOD are found in the Standing Rules for Delegates/Alternates) Those seeking reimbursement should remember that NCSMA will reimburse **ONLY** the expenses detailed below. Each officer/authorized committee chair/member should submit individual receipts for expenses claimed. When multiple persons are included on one receipt everyone is responsible to obtain a copy to seek individual reimbursement. **Rationale:** As amounts are budgeted based on individual offices/committees it is important that the expenses be correctly allocated for the correct budget line items.

Mileage: Round trip mileage at the rate of \$0.50 (effective 04-29-2024), will be reimbursed for the following using their vehicle for reimbursable travel.

1. Attendance at each NCSMA Board of Directors meeting for:
 - a. President
 - b. Vice-President
 - c. President-Elect
 - d. Secretary
 - e. Treasurer
 - f. Speaker of the House of Delegates
 - g. Vice-Speaker of the House of Delegates
 - h. Immediate Past President
 - i. Parliamentarian
 - j. Chaplain
2. Committee members attending functions other than NCSMA meetings as part of the required and/or assigned duties of their committee as described in the NCSMA Committee Guidelines or by approval of the BOD.
3. Elected officers asked to represent NCSMA at chapter officer installations or medical assisting program pinning ceremonies (chapters or MA programs inviting the elected officer will be responsible for all other expenses)
4. Other NCSMA members who have been granted permission to represent NCSMA by the BOD or Executive Council

Required Documentation: Printout of an online map (Google, MapQuest) showing the mileage from the member's point of origin to the host hotel and the return mileage. If the online map shows more than one available route the amount reimbursed will be for the lowest mileage amount, regardless of the route taken. In the event two or more officers

or authorized committee members share a ride to an event that is eligible for mileage, then reimbursement will be made to the member driving their vehicle. It should be noted on the voucher that $\frac{1}{2}$ of the mileage should be charged to each of the officer's budgets.

For example: Two NCSMA officers from the same chapter share a ride to the NCSMA Summer Seminar. The officer driving will claim reimbursement for the mileage but will note that $\frac{1}{2}$ of the expense should be charged to their budget and $\frac{1}{2}$ to the other officer's budget.

Hotel Room Costs:

One-half ($\frac{1}{2}$) of the lowest double occupancy group rate + applicable taxes offered by the host hotel is the maximum that will be reimbursed. In the event a group rate is not offered (if attending a non-group/NCSMA function) then the lowest double occupancy rate available at the time of reservation will be considered. If a hotel room is shared by more than two persons then reimbursement will be based on the proportionate share ($\frac{1}{3}$ for 3 occupying the room, $\frac{1}{4}$ for 4, etc.) of the lowest group double occupancy rate.

For example:

Three people, one of whom is an NCSMA officer, are sharing a room for the NCSMA Convention. The hotel offers a double occupancy room at a rate of \$210 (including taxes) per night. The hotel also offers a double occupancy suite option at a rate of \$270 (including taxes), which the three reserve for the convention. When calculating reimbursement for the NCSMA officer the amount of \$210 will be used as it is the lowest double occupancy rate. The officer would be reimbursed for $\frac{1}{3}$ of \$210 or \$70 per night **NOT** $\frac{1}{3}$ of \$270 or \$90 per night.

Hotel costs are reimbursable for the following:

- for elected officers, Immediate Past President, and Parliamentarian at NCSMA seminars (2-night maximum) and convention (3-night maximum)
- for committee members attending functions other than NCSMA meetings as part of the required and/or assigned duties of their committee as described in the NCSMA Committee Guidelines or by approval of the BOD
- for other NCSMA members who have been granted permission to attend functions by the BOD or Executive Council

(Newly elected officers will receive no reimbursement for expenses at the convention. Outgoing officers will be reimbursed. **Rationale:** Outgoing officers are required to attend various functions, pre-convention board meeting, House of Delegates, Awards Luncheon, President's Banquet, First Timers, etc.) Incoming officers are only required to attend the post-convention board meeting.

Required Documentation:

A copy of the hotel bill documenting the lowest group double occupancy room rate + applicable taxes. If the room rate shown on the bill is greater than the lowest group double occupancy room rate including applicable taxes, then that rate should be noted on the bill for reimbursement purposes. The bill should also note the number of individuals occupying the room.

Materials, supplies, and postage related to the business of the committee or office held within their budget allocation.

Required Documentation:

A copy of the receipts/invoices detailing the materials, supplies, and postage. An explanation of why these items were needed for the functioning of the committee or office should be provided along with the invoice/receipt.

Non-Reimbursable Expenses

Meals and registration for educational events, including NCSMA seminars and convention (except for AAMA Delegates and Alternates per diem - *See Standing Rules for Delegates and Alternates to the AAMA House of Delegates for reimbursement policies for delegates/alternates.*) Additionally, personalized stationery, cards, favors, gifts, stickers, erasers, pencils, pens, magnets, candy, etc. or any personal items are not reimbursable.

Questions regarding these guidelines should be referred to the President and President-Elect before submission of the expense for reimbursement.