




# Operating Procedure Human Resources

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	Revision: 18	Effective Date: 1/1/2021

Approved by:  Fred Millen, HR Director
Applicable to:  APSC Employees

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## 1.0 Purpose

To provide guidance and direction for eligible employees requesting travel reimbursement for a death or anticipated death in the family.

## 2.0 Accountable Resources

**Supervisors:** review and approve employee’s bereavement or emergency leave.

**Sr. HR Representative:** authorizes exceptions to this procedure.

**HR Generalists:** administer and interpret this procedure, complete a review of employee’s *Form 5002, Employee Expense Record*, and sign or authorize via email to reflect HR approval with the associated expenses after confirming all required documentation is attached to the form.

**Payroll:** administer approved bereavement or emergency leave, reimburse covered travel expenses when *Form 5002, Employee Expense Record*, is submitted, and calculate and process imputed income.

**Employees:** follow this procedure when requesting bereavement or emergency leave; provide all required documentation to verify the reason for the leave and original receipts for expenses and submit to HR for approval and processing.

## 3.0 References

- *APSC’s Approval Authority Guide (AAG)*
- *HR-2.10, Time Reporting*
- *Form 5002, Employee Expense Record*



## 4.0 Procedure

### A. ENTITLEMENT

Distinct entitlement benefits are granted to an employee based on the family relationship designation. Travel reimbursement is applied only once for each specific Next-Of-Kin, Immediate Family Member, or Employee during the course of employment.

Death, Anticipated Death, or Catastrophic Illness/Injury of:	Family Category:	Who is Eligible for the Benefit:
Mother or Father of Employee, Spouse, or Domestic Partner on file with HR. Sister or Brother of Employee, Spouse, or Domestic Partner on file with HR. Grandmother or Grandfather of Employee, Spouse, or Domestic Partner on file with HR.	1. Next-Of-Kin	Employee <u>OR</u> Dependent
Spouse or Domestic Partner on file with HR	2. Immediate Family Member	Employee <u>AND</u> Dependents
Child or Grandchild	2. Immediate Family Member	Employee, Spouse or Domestic Partner on file with HR, <u>AND</u> Dependents
Employee	3. Employee	Spouse or Domestic Partner on file with HR <u>AND</u> Dependents

1. Next-Of-Kin

In the event of a death, anticipated death, or catastrophic illness/injury of next-of-kin, the employee **or** a dependent (as defined in the Alyeska General Information Summary Plan Description (SPD)) is eligible for travel reimbursement. Next-of-kin is defined as parents, grandparents, brothers, or sisters of the employee, spouse, whether established by blood, marriage, or legal action, or a domestic partner with an Affidavit of Domestic Partnership on file with HR.

2. Immediate Family Member

In the event of a death, anticipated death, or catastrophic illness/injury of an immediate family member, the employee **and** dependents (as defined in the Alyeska General Information SPD) are eligible for travel reimbursement. Immediate family member is defined as a spouse, child, or grandchild of the employee whether established by blood, marriage, or other legal action, or a domestic partner with an Affidavit of Domestic Partnership on file with HR.

3. Employee

In the event of a death, anticipated death, or catastrophic illness/injury of an employee, the spouse **and** dependents (as defined in the Alyeska General Information SPD) are eligible for travel reimbursement.



### **Death of Employee, Spouse, Domestic Partner, or Dependent Child Outside Resident City**

In the event of the death of an employee, spouse, domestic partner with an Affidavit of Domestic Partnership on file with HR, or dependent child outside the resident city, the employee or dependent will have the option of returning the deceased to the resident city, the point of origin, or equivalent.

Specifically, the reimbursement includes the expenses incurred to have the remains of the employee, spouse, domestic partner with an Affidavit of Domestic Partnership on file with HR, or dependent child taken to the (1) residential city where he/she lived, (2) the point of origin or (3) the equivalent cost to transport the remains to another location.

### **B. REIMBURSABLE EXPENSES**

#### **Travel reimbursement includes:**

- Full-fare, round-trip, domestic coach class airfare or mileage driven to and from the employee's point of departure or physical residence address to the point of emergency
- 2 pieces of checked luggage
- 2 days of surface transportation at the location of the emergency

Employees are encouraged to request bereavement airfares if available and applicable to the reason for travel.

To receive reimbursement of expenses, the point of emergency must be located more than 145 miles from the employee's point of departure, or residence.

All other expenses incurred by the employee and/or dependent(s) are not reimbursable.

#### **Destinations Outside the United States:**

For final destination points outside the United States, the reimbursement will be to the most convenient U.S. city departure point closest to the international location.

### **C. REIMBURSEMENT PROCESS**

Employees must pay for bereavement or emergency leave travel out of pocket and request reimbursement by completing *Form 5002, Employee Expense Record*.

When submitting *Form 5002, Employee Expense Record*, documentation is required to include:

- Related receipts
  - a coach airline invoice/receipt clearly listing the price paid
  - baggage fees (up to 2 bags per person)
  - car rental and gas receipts or proof of other transportation,
- a letter from the hospital, funeral home, service program, death certificate, or obituary, if applicable to the situation.



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- A note on *Form 5002, Employee Expense Record* in the “relationship to the employee” section to describe the relationship to the family member (i.e. father, mother, mother-in-law, domestic partner’s father, etc.).

The form and all required documentation are submitted to HR.

HR reviews, approves, and submits the completed *Form 5002, Employee Expense Record* to Payroll for processing. Travel expenses covered by this procedure is considered taxable income and will be processed as part of the employee’s next regularly scheduled paycheck. An employee can direct questions regarding how taxes are processed to Payroll.

#### **D. LEAVE AUTHORIZATION**

Up to five (5) days paid Bereavement and Emergency Leave will be authorized with supervisory approval for eligible employees. The five days of paid leave is taken during the employee’s regularly scheduled workdays. If additional time off is required, the employee may use approved paid leave entitlements or may request time off without pay subject to supervisory approval. Bereavement and Emergency Leave hours are not considered hours worked for purposes of overtime calculations.

**End of Procedure**



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## 5.0 Records

<p><i>Form 5002, Employee Expense Record</i> and associated required backup documentation as identified in this procedure (e.g. travel receipts, obituary, etc.)</p>	<p>All records generated as a result of this document will be retained in accordance with <i>CW-200, Records Retention Schedule</i>.</p>
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## 6.0 Revision History

Revision	Date	Revision Summary
18	01/01/2021	Increased leave allowed to 5 days. Other minor corrections.
17	08/30/2019	Added Records Section; updated procedure to reflect supervisory approval only needed for time off. HR approves and processes reimbursements. Added domestic partner as allowed dependent and clarified language.
16	10/03/2016	Updated procedure to reflect that employees can no longer use their Corporate Card for expenses as part of this procedure.
15	01/09/2015	Confirming unique cost string information required for bereavement expense line items. Reordering the entitlement in procedure. Adding table for employee reference in section A. Entitlement.
14	10/27/2011	Revision processed to improve the language pertaining to the benefits an employee may be eligible for and to clarify the documentation and process to follow when an employee is seeking approved expense reimbursement.
13	11/06/2006	Revision processed to improve the language pertaining to the documentation that employees are required to submit when seeking bereavement or emergency leave benefits.
12	02/02/2006	Kevin Hostler and Kristi Acuff signed.
11	06/21/2004	Initial publication to the TAPS Document System.
10	09/17/2001	Unknown.
9	03/13/2000	Unknown.
8	02/28/1999	Unknown.
0-7	unknown	Unknown.