



BENEFIT PLANS

MEBA MEDICAL & BENEFITS PLAN

MEBA PENSION TRUST

MEBA TRAINING PLAN

MEBA VACATION PLAN

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MEBA TRAINING PLAN SUMMARY OF MATERIAL MODIFICATION

This Summary of Material Modification advises you of changes in the information contained in the Rules and Regulations of the MEBA Training Plan ("Plan"), as required by the Employee Retirement Income Security Act of 1974. The Trustees of the MEBA Training Plan have amended the Plan to modify the definition of "home of record" with respect to travel reimbursement. The Plan has been changed as described below, effective June 1, 2016.

HOME OF RECORD

The Trustees amended the Plan to define a participant's home of record as the participant's primary residence and to provide that if the participant's primary residence is outside of the United States, the participant's home of record will be deemed to be the airport included on a list designated by the Trustees of major Continental United States airports that is closest to the participant's home of record. The Plan previously defined a participant's home of record as the address on file with the Plan Office and provided that if a participant resides outside of the United States, the home of record will be deemed to be the point of entry into the Continental United States that is closest to the participant's home of record. (Comparable changes were made to the definition of "home of record" in the Plan's Travel Policy.)

a. Accordingly, Article 1, Section 9(b)(3) of the Plan was amended to read as follows:

(3) *Home of Record:* The participant's home of record will be the participant's primary residence. If a participant's primary residence is outside of the United States, the home of record for the purpose of paying the travel reimbursement will be deemed to be the airport included on a list designated by the Trustees of major Continental United States airports that is closest to the participant's home of record.

Please contact the Calhoon MEBA Engineering School if you have any questions.


Ann S. Gilchrist, Administrator

MEBA Training Plan Travel Policy **Approved by the Board of Trustees**

Travel Agency

- The MEBA Training Plan (the “Training Plan”) has arranged to have an in-house Travel Coordinator (the “Travel Agency”) to provide travel services to Participants attending the Calhoon MEBA Engineering School.
- Use of the Travel Agency is mandatory to receive reimbursement of all air travel expenses.
- Participants must make the initial payment for travel expenses and will be reimbursed by the Training Plan subject to the limits of this Policy.

Home of Record

- All travel reimbursement will be made based on the Participant’s Home of Record.
- The Participant’s Home of Record will be the address on file with the MEBA Benefit Plan Office.
- If a Participant resides outside of the United States, the Home of Record for the purpose of paying the travel reimbursement will be deemed to be the airport included on a list designated by the Trustees of major Continental United States airports that is closest to the Participant’s Home of Record.

Frequency of Reimbursement

- Reimbursement of round-trip transportation will be afforded to a Participant to attend any class of at least one week duration.
- No more than two round-trip reimbursements will be made during any calendar year.
- There must be at least a one-week break between classes to be eligible to receive a second round-trip transportation reimbursement.
- Travel paid or reimbursed by a MEBA Training Plan contributing employer for travel to the School or by the MEBA Medical and Benefits Plan for transportation to the Baltimore MEBA Diagnostic Center immediately before or after an attended class will not be reimbursed under this policy.
- Round-trip reimbursement will be paid at the School upon course completion. If reimbursement is made to a Participant and it is later discovered that the ticket was not used, the Participant will not be allowed to attend future classes until such time as the reimbursement is repaid to the Training Plan.

Maximum Reimbursement

- Reimbursement for travel by airplane shall be based upon coach air fare actually paid subject to the maximum reimbursement herein. Airfare will not be reimbursed if the Participant’s Home of Record is 75 miles or less from the School.
- For the purpose of all transportation reimbursement, the maximum reimbursement shall be the in-policy fares calculated from the minimum cost of round-trip, non-refundable, seven-day, advance purchase coach air fare as determined by the Training Plan’s Travel Coordinator.
- In order to maximize fare reductions and thereby reduce travel expense for the Training Plan, Participants are encouraged to make and confirm travel arrangements with the Travel Coordinator 21 days or more in advance.

- Reimbursement for travel by train or bus shall be based upon actual transportation fare incurred; however reimbursement will not exceed the maximum amount payable had the Participant traveled by air and used the Training Plan's Travel Coordinator.
- Reimbursement for travel by automobile shall be based upon mileage, payable the IRS mileage allowance then in effect, and will not exceed the maximum amount payable had the Participant traveled by air and used the Training Plan's Travel Coordinator. The maximum reimbursable mileage shall be computed on the basis of official automobile club maps. For automobile travel in excess of 400 miles one way, gasoline and/or hotel receipts must be presented to establish travel but reimbursement will be at the IRS mileage rate and gasoline, tolls, and hotel will not be reimbursed.
- Travel from a location other than a Participant's Home of Record will be reimbursed but shall not exceed the maximum amount payable had the Participant traveled by air from his Home of Record and used the Training Plan's Travel Coordinator.
- In the case of a Participant employed as a permanent ROS employee traveling from a ROS vessel, reimbursement from the vessel will be paid in lieu of the Participant's Home of Record provided the Training Plan's Travel Coordinator is used to arrange air travel.
- With proper documentation, travel arranged less than seven days in advance will be reimbursed at the round-trip, non-refundable coach fare for Participants discharged from a vessel within the seven-day window preceding a class.
- Participants will be reimbursed for original booking fees charged during normal operating hours of the Travel Coordinator.
- Other than original booking fees assessed during normal operating hours, fees for after-hours bookings or changes will not be reimbursed.
- Change or cancellation fees will not be reimbursed; however, should a class be cancelled and a ticket has already been purchased, normal airline cancellation fees or change fees for another class will be reimbursed.

Travel Allowance

- A travel allowance for ground transportation in the amount of \$100 to cover transportation to and from the Baltimore-Washington International Airport when air travel is reimbursed will be paid in addition to the travel reimbursement.
- The travel allowance for ground transportation will be paid upon course completion.

Travel Arrangements

- For travel by airplane, non-stop or one-stop direct flights are preferable; however, one-stop connecting flights are acceptable so long as the travel time is not extended by more than 120 minutes over non-stop flights.
- Should such flights be unavailable, multiple-stop direct or connecting flights may be arranged.

Required Documentation

- For all travel subject to reimbursement, copies of actual travel documentation, including but not limited to, tickets, boarding passes and receipts must be presented.
- The Training Plan's Travel Coordinator's reports may be accepted for reimbursement in lieu of actual tickets, boarding passes and receipts.

Approved list of Major airports in the United States:

Baltimore Washington International
Boston Logan International Airport
Charlotte Douglas International Airport
Chicago O'Hare International Airport
Dallas/Fort Worth International Airport
Detroit Metropolitan Wayne County Airport
George Bush Intercontinental Airport
Hartsfield-Jackson Atlanta International Airport
John F. Kennedy International Airport
Los Angeles International Airport
Miami International Airport
Minneapolis-Saint Paul International Airport
Newark Liberty International Airport
Oakland International Airport
Orlando International Airport
Philadelphia International Airport
San Francisco International Airport
Seattle-Tacoma International Airport
Washington Dulles International Airport