ANGÉLICA INFANTE-GREEN
Commissioner

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Travel Reimbursement Procedures

A completed and approved Travel Proposal Form should have been previously submitted and on file in order to submit for any Travel Reimbursement.

Submitting for Reimbursement

1. When you are requesting reimbursement you need to complete tabs 2 (Receipt Detail) and 3 (Category Totals) of the Travel Proposal form.
   a. If you are using your original saved Travel Proposal form, simply click on tab 2 (Receipt Detail).
   b. If you are using a new blank Travel Proposal form you will have to click on tab 1 (Proposal) and enter your name at the top of the form. Then go to Event Name and enter the name of the conference you attended. You can then continue to tab 2 (Receipt Detail). If you do not do this your name will not appear on the top of tab 2 (Receipts Detail) and when it is submitted there will be no way to confirm the Receipt Detail page belongs to you.
2. On the Detail Receipt form, there are 3 sections that need to be completed for each receipt you are submitting for reimbursement. They are Category, Amount, and Description/Comment
3. When entering your items on Tab 2 (Receipt Detail tab) you must list each item individually, you ***cannot*** bulk items together. For example, you cannot total all your meals together and list them as one total (Each meal must be listed individually)
4. Start with Category. This is a drop down tab and there are 5 options to choose from, Event Fee, Travel to Destination, Lodging, Meals, and Local Travel. You need to choose the option that best describes the item you are requesting reimbursement of. See the sample on page 2 for a list of examples of these categories
5. The next section is Amount. Enter the dollar amount of your receipt (You are allowed to include the tip in your reimbursement total for meals and taxi/ubers/lyft, etc.)
6. The next section is Description/Category. Entered a brief description of the receipt you are requesting reimbursement of, include the date for the receipt. It can also include what the receipt is specifically for, parking, a taxi, an Uber/Lyft, name of the restaurant. Anything that will help explain what the category and item amount is for.
7. Once you have listed all your receipts from your travels you are requesting reimbursement for, you have completed tab 2 (Receipt Detail). Tab 3 (Category Totals) will automatically fill in with the information you have entered on tab 2 (Receipt Detail).
8. Save this document to your computer and then print tabs 2 (Receipt Detail) and tab 3 (Category Totals).
9. You will then have to obtain copies of ***ALL*** your bank/credit card statements showing all your requested reimbursement purchases posting to those statements.
10. Put a packet together that includes tabs 2 (Receipt Detail) and tabs 3 (Category Totals), copies of all **original receipts** and **corresponding bank/credit card statements** and send this packet to Jennifer DiZoglio/Budget Office. ****PLEASE NOTE ALL MEAL RECEIPTS MUST BE ITEMIZED OR THEY WILL NOT BE HONORED AT THE FULL PURCHASE PRICE.*** We will only be able to reimburse you $6.00 for that meal**.** This policy is strictly enforced!
11. When submitting bank/credit card statements, you can black out all information except your name, the last 4 digits of the account number, and the purchases you are requesting reimbursement of.
12. Once I receive all the documentation I will review the submitted packet. If I have any questions or concerns, I will email you. Once the packet is completed I will submit it for approval. Once it is approved a direct payment is completed and submitted to accounting.

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CATEGORY	DESCRIPTION/COMMENT EXAMPLES
Event Fee	The cost to register to the conference or workshop you are attending
Travel to Destination	Airfare, train ticket, bus ticket
Lodging	Hotel
Meals	Restaurant meals, coffees, snacks
Local Travel	If you used your own vehicle to travel to the event, you would be reimbursed the standard mileage rate of ¢.67 per mile (this rate varies yearly. The IRS determines the current rate, https://www.irs.gov/tax-professionals/standard-mileage-rates) from 797 Westminster Street to the event and back. We use Mapquest to obtain the mileage from 797 to the address of the event and back and calculate the total reimbursement. This can also be for Uber/Lyft and Taxi services

Supporting Doc Required to be Submitted with Travel Reimbursement Packet

1. **Travel Proposal Form**
2. **Detail Receipt tab**
3. **Category Totals tab**
4. **Copies of all receipts**
5. **Copies of all bank/credit card statement(s)**

Last Updated 05/26/26