

SUBJECT: GUIDELINES FOR USE OF CLAIM FORMS

Claim forms are for the use of employees for reimbursement of their personal use of money for miscellaneous work related expenditures, when it is not feasible or economical to use a purchase order.

The procedures for completing a Claim Form are as follows:

- a) Claim forms used by employees are not to exceed one hundred fifty dollars (\$150).
- b) All appropriate original receipts must be attached. Reimbursements will not be approved if a copy of the check front and back or credit card statement will be acceptable. If a gift certificate is purchased, a copy of the certificate with the student's name identified on it will also be required with the receipt.
- c) Only one employee can submit for reimbursement per receipt.
- d) Proper types of receipts of include:
 1. Store registers tapes showing the store name/description of item/date.
 2. Invoices with company letterhead listing the employee as the purchaser and stamped paid in full.
 3. Employee credit card statement and shipping document (if purchased by phone).
 4. Copy of front and back of canceled check along with order form or registration form. For meals over \$25, an itemized receipt is required (these receipts are now standard in most restaurants). All costs for alcoholic beverages need to be deducted.
- e) The complete budget code must be entered, or will be returned to the Supervisor, which could delay processing.
- f) Claim forms are not to be used to pay for contractual services such as for bus transportation or field trip admissions. In those cases a purchase order should always be used.
- g) Supervisor's approval is required.