



SEIU LOCAL 1021 MEMBER TRAVEL EXPENSE REIMBURSEMENT REQUEST

(DO NOT USE THIS FORM TO CLAIM MILEAGE)

NAME: _____ SOCIAL SECURITY # _____

HOME ADDRESS: _____

CITY: _____ ZIP: _____

EMPLOYER: _____

EMAIL: _____ PHONE: (_____) _____

**CHECK ALL APPROPRIATE BOXES
ITEMIZE ALL EXPENSES AND ATTACH RECEIPTS:**

**OFFICE
USE ONLY**

HOTEL/MOTEL: _____ \$ _____

TELEPHONE CALLS: _____ \$ _____

GROUND TRANSPORTATION: _____ \$ _____

MEAL PER DIEM (attach itemized list and event agenda/program): \$ _____

TOTAL: \$ _____

MEETING/EVENT DATE: _____

MEETING/EVENT LOCATION: _____

MEETING/EVENT ADDRESS (street) _____

City: _____ Zip: _____

PURPOSE/NAME OF MEETING/EVENT: _____

LM2

APPROVED: _____

MEMBER SIGNATURE: _____ DATE: _____

AUTHORIZING SIGNATURE*: _____ DATE: _____

*Local 1021 chief elected officer, president, treasurer, industry chair, committee chair, or director.

Reimbursement requests and supporting documentation must be submitted within six (6) months of the expense being incurred. Reimbursement requests submitted with proper documentation and authorization will be processed within two (2) weeks of receipt by the finance department.

HOW TO CLAIM TRAVEL EXPENSE REIMBURSEMENT

- (1) Complete the Local 1021 MEMBER TRAVEL EXPENSE REIMBURSEMENT REQUEST form—PRINT all information (we must be able to read your form to honor your claim).
- (2) Indicate the reason you are requesting reimbursement (i.e., hotel, meal, etc.) and the amount of the expense. You must submit original, dated receipts (not credit card receipts) in order to be reimbursed.
- (3) **BE SURE TO COMPLETE ALL INFORMATION AND SIGN THE REQUEST FORM**—the person who authorized the reimbursement or treasurer must also sign the form.
- (4) Reimbursement requests and supporting documentation must be submitted within sixty (60) days of the expense being incurred. Reimbursement requests submitted with proper documentation and authorization will be processed within two (2) weeks of receipt by the finance department. Submit completed form and receipts to: SEIU Local 1021, P.O. Box 2077, Oakland, CA 94604-2077

Travel: All travel arrangements shall be made through a designated staff person, unless an exception is authorized by the chief elected officer, president, director, industry chair, or committee chair. Unless otherwise authorized, the local will not pay the travel expenses of a spouse, partner, or other traveling companion.

Overnight accommodations: The local will only pay for the cost of standard hotel rooms. The local will not reimburse personal incidental charges such as in-room movies and liquor. Double occupancy rooms will be reimbursed. Members who choose to not share a room will be responsible for the difference in cost of a double room. Members who fail to notify the union of cancellation and/or simply do not show up will be responsible for the cost of a reserved room. Members may request smoking or non-smoking rooms. Members who violate a hotel's smoking policy will be responsible for any fines imposed by the hotel.

Telephone calls while out of town: All telephone calls will be presumed to be union business-related or personal calls which are necessitated by your absence from your normal place of work and residence and therefore will be reimbursed without documentation as to the specific purpose of each call. Calls that do not fall into these two categories should not be submitted for reimbursement. The original hotel bill showing the calls that were made while staying in the hotel will be sufficient documentation to obtain reimbursement. If the number of calls appears excessive, further explanation may be required. Reasonable cell phone charges incurred while out of town will be reimbursed with proper documentation.

Ground transportation while out of town: Authorized members will be reimbursed for the cost of transportation (i.e., shuttles) for round-trip travel between the airport and the hotel/motel. Members will be reimbursed for round-trip travel between the hotel/motel and event only if the event is not located at the hotel/motel at which the member is staying. Travel for other purposes will not be covered unless authorized by the chief elected officer, president, director, industry chair, or committee chair. Members must provide proper documentation of the expense.

Meals: Authorized members will receive the following per diem for out-of-town travel meals unless the specified meal is provided by the event or the local: \$10.00 per day for breakfast, \$12.00 per day for lunch, \$25.00 per day for dinner. Alcoholic beverages will not be reimbursed. Members may claim meal per diems only for themselves. Members cannot be reimbursed for meals they purchase for others.

Receipts and documentation: Documentation must be submitted on the local's official reimbursement form with all receipts and other necessary documentation attached. Original receipts, not copies or credit card receipts, are required for reimbursement. Copies of cancelled checks are not considered receipts. A bill, in itself, is not a receipt. Bills must be stamped "paid" by the vendor. Adequate documentation must include: date the expense was incurred; the nature of the expense (e.g., hotel, meal, etc.); a sufficiently detailed description of the purpose of the expense; where the expense was incurred (e.g., name and location of the union office, hotel, etc.); the name and title of every person on whose behalf an expense was incurred (e.g., everyone whose meal was paid for).

The chief elected officer, president, treasurer, industry chair, committee chair, or director shall carefully review documentation for accuracy before approving reimbursement.

Exceptions: The chief elected officer, president, industry chair, committee chair, or director may grant an exception to any of the restrictions within this policy when s/he determines that circumstances warrant an exception. Such exceptions are subject to review by the executive board. Anyone who requests an exception should be aware that the exception may be under IRS and/or DOL rules and result in taxable income that you must report to the IRS and/or DOL. In such cases, your W-2 form at the end of the year will reflect the additional income and the local will report the cost of the expense as "other disbursements" on the local's LM-2 report. Exceptions involving the president must be approved by the executive board.