



## EXPENSE REIMBURSEMENT VOUCHER 2017

*(Please complete and return to the Institute's office along with all receipts.)\**

Suggestions herein for submitting this form follow requirements of the Internal Revenue Code and Treasury Regulation and their observance will minimize income tax accounting procedures for recipients of reimbursement expenses and for the Institute.

1. **Course Title:** \_\_\_\_\_ **Project #:** \_\_\_\_\_  
 (PBI Use Only)
2. **Other purpose for which expended:** \_\_\_\_\_

3. **Expenditures:**

	Date	Date	Date	Date	Date	
						Totals
A. Food						
B. Hotel or Other Lodging						
C. Local Transportation						
D. Gratuities						
E. Miscellaneous:						
Tolls:						
Parking:						
F. Transportation:						
From: _____ to _____ and return.						
Means: _____ Mileage: ** _____ (miles) x .40 =						
<b>TOTAL</b>						

4. **Total amount for which reimbursement is requested:** \$ \_\_\_\_\_ Date \_\_\_\_\_
- Name \_\_\_\_\_ Atty ID \_\_\_\_\_
- Address \_\_\_\_\_
- \_\_\_\_\_
- Approved \_\_\_\_\_ Signature \_\_\_\_\_  
Program Attorney

\*If expenses were incurred for others, please indicate on reverse side type, date, amount and purpose, and names and relationship to the Institute of such other persons. Expenses for spouses are not reimbursable unless authorized for a special purpose in advance. If authorized, such expense should be designated with the letter "s" and the reimbursement will be reported by the Institute on Treasury Form 1099.

\*\*To be given only where transportation is by personal automobile. Reimbursement for mileage expenses incurred effective January 1, 2015, is at the rate of 40 cents per mile.

### PBI POLICY ON REIMBURSEMENT OF TRAVEL EXPENSES

The Pennsylvania Bar Institute will reimburse its faculty member's reasonable travel expenses, including mileage, parking, meals, and hotel sleeping rooms in accordance with the policy on the reverse side.

Please submit original receipts (not credit card receipts) for any expenses for which you are seeking reimbursement.

We cannot reimburse personal expenses such as in-room movies, bar bills, or telephone calls.

Where possible, PBI will arrange for hotel sleeping room charges (only) to be direct billed to the Institute. We provide an expense reimbursement voucher to be completed regarding the other reasonable travel expenses described above.



## **Faculty Travel Expense Reimbursement Policy**

### **Policy When Travel Exceeds 75 Miles (One Way)**

The Pennsylvania Bar Institute (PBI) will reimburse CLE program faculty members and publication authors who travel more than 75 miles (one way) for the following travel and out-of-pocket expenses if reasonable and incurred as a direct result of their participation in a PBI seminar, planning meeting or other similar activity:

- ⌘ Mileage at a rate that is 70% of the current IRS rate for deductible travel expenses as it may change from time to time.
- ⌘ Automobile rental, including collision insurance coverage if not covered by the volunteer's individual personal or business insurance
- ⌘ Parking
- ⌘ Highway and bridge tolls
- ⌘ Coach rail or airfare
  - If the airfare includes travel that is unrelated to PBI activity, PBI will reimburse for an amount that can reasonably be allocated to the PBI activity;
- ⌘ Local transportation from airports to the seminar location and return
- ⌘ Overnight standard hotel sleeping room
  - We cannot reimburse for personal expenses such as in-room movies, alcoholic beverages, telephone calls and health club usage
  - Where possible, PBI will arrange for hotel charges (as limited above) to be billed directly to PBI
- ⌘ Gratuities
- ⌘ Meals during the time of travel

### **Policy When Travel is 75 Miles or Less (One Way)**

The Pennsylvania Bar Institute (PBI) will reimburse CLE program faculty members and publication authors who travel 75 miles or less (one way) for the following travel and out-of-pocket expenses if reasonable and incurred as a direct result of their participation in a PBI seminar, planning meeting or other similar activity:

- ⌘ Mileage at a rate that is 70% of the current IRS rate for deductible travel expenses as it may change from time to time.
- ⌘ Automobile rental, including collision insurance coverage if not covered by the volunteer's individual personal or business insurance
- ⌘ Parking
- ⌘ Highway and bridge tolls
- ⌘ Meals during the time of travel up to \$20 per meal

Those seeking reimbursement must complete an Expense Reimbursement Voucher and include original receipts (not credit card receipts) for all expenses except incidental gratuities.

In exceptional circumstances, the Executive Director or his designated senior staff member, or the Treasurer may on recommendation approve additional faculty travel expenses if warranted by the circumstances.