



PHI DELTA KAPPA INTERNATIONAL

The Professional Association in Education

Expense Reimbursement Form

- Appropriate receipts must be attached to this form.
- For guidelines concerning receipts and other information, see the back of this form.
- CMLs should send completed forms to their Regional Representative for review. Regional Representatives will forward them to the PDK International office for payment processing.
- Regional Representatives may choose to request advance approval for regional CML travel.
- Each report should be filed within 60 days of completion of the activity or trip.

Name _____ Office _____

Address _____ Activity _____

Nature of Expenses	Dates and Amounts					Additional Information
	___/___/___	___/___/___	___/___/___	___/___/___	___/___/___	
Auto _____ miles @ current IRS rate per mile	_____ miles	_____ miles	_____ miles	_____ miles	_____ miles	
	\$	\$	\$	\$	\$	\$
Air Fare						
Auto Rental						
Room						
Meal 1 (including tip)						
Meal 2 (including tip)						
Meal 3 (including tip)						
Taxi, Limousine						
Parking						
Postage						
Service Tips						
Telephone						
Tolls						
Misc.: Explain						
Totals Per Day						

Total Reimbursement Due \$ _____

Less Advance Received \$ _____

Reimbursement Requested \$ _____

Claimant's Signature _____

Regional Representative Approval if Applicable _____

Guidelines For Travel Expenditures

General guidelines applicable to all PDK expenditures are as follows:

1. Air travel is reimbursed on the basis of coach class fare or actual cost, whichever is cheaper.
2. Automobile travel is reimbursed at the mileage rate allowed by the Internal Revenue Service.
3. Travel reimbursement is normally based on the method of travel most economical for PDK. If a more expensive method of travel is used because of personal preference and/or convenience (i.e., personal automobile when air fare is significantly cheaper), reimbursement is based on the least expensive method.
4. Among items considered reimbursable are the following:
 - a. Ground transportation in conjunction with air travel.
 - b. Hotel or lodging at the single-occupancy rate.
 - c. Tips for services.
 - d. Meals and non-alcoholic beverage.
 - e. Airport parking.
 - f. Office expenses (postage, phone calls, copying charges, etc.) for PDK business.
 - g. Toll charges.
5. Items not generally considered reimbursable include the following:
 - a. Bar bills.
 - b. Entertainment (movies, sporting events, etc.).
 - c. Personal convenience items (newspapers, magazines, cigars, cigarettes, etc.).
6. Expenditures are to be supported by receipts whenever possible.
7. Expenditures for spouses may be paid as incurred or itemized and subtracted from the subsequent claim.
8. An advance against expenses is made on request as long as the total requested does not exceed the anticipated expense.
9. Board members, staff members, and chapter/member liaisons are expected to assume responsibility for expenses in connection with attendance at meetings of their home chapters.

The following guidelines relate specifically to the regional representative:

1. The RR's expenditure area is the region. Payment for travel and other expenditures incurred within the region is made on the RR's request.
2. Travel outside the region is reimbursed provided such travel is authorized by the *Constitution and Bylaws* or the International Board.

The following guidelines relate specifically to chapter/member liaisons:

1. The chapter/member liaison's expenditure area is defined by the assigned area of responsibility within the region. Payment for travel and expenditures within the area is made on approval by the regional representative.
2. Reimbursement for travel outside the chapter/member liaison's area is authorized for area-sponsored activities and the RR/CML meeting. The regional representative may approve attendance of a newly elected CML at an officer training conference in another area within the region. Reimbursement for other travel outside the area is made provided such travel has been authorized by the International Board.