

**Bethlehem Central School District
Claim For Expenses
Conference and/or Meeting**

- Attach to this form:
 Registration form
 Copy of your Leave Request form.
 Receiving Copy of purchase order.
 Copy of check or credit card statement.
 All original receipts.
 Proof of Conference Attendance

Pay to: _____ for actual and necessary expenses incurred on authorized attendance in the interests of Bethlehem Central School District at a meeting and/or conference:

Name of organization or group sponsoring conference _____

Location _____

Time: From _____, _____ through _____.
Date Time Date Time

Conference/Workshop
Registration _____

*Travel: (must be pre-approved)
By auto to and from destination _____ miles _____
Toll charges thruways, turnpikes (attach original receipts) _____
Train, plane, bus (attach your portion of ticket) _____

Overnight Travel
Meals: (attach itemized receipts) _____ meals _____
-Tax not reimbursed
Lodging: (attach itemized receipts) ___ days ___ per day _____

**Other expenses: (itemize)
Explain: _____

Total Expenses _____

This is to certify that said claim is just, due and unpaid and that there are no offsets against the same; that the items are reasonable and just; that no payment has been made on account thereof, except as included or referred to in such account or claim.

Date _____ Signed _____

* Obtain exemption letter from Business Office before departure.

**Membership fees are not allowable.

All paperwork (see check off box) must be submitted with the blue Claim for Expense form and approved by an administrator or supervisor to receive reimbursement.

Supervisor: _____ Date: _____

Building Principal: _____ Date: _____

Assistant Superintendent: _____ Date: _____

Chief Business and Financial Officer: _____ Date: _____

The Board of Education Policy for conferences/travel expense reimbursement allows reasonable expenses, incurred while traveling for school related activities, to be reimbursed.

The conference/travel expense reimbursement process is as follows:

Approval: All conferences and training must have prior approval from their Supervisor, Building Principal, Assistant Superintendent for Curriculum or Chief Business and Financial Officer; this must be documented on a Leave of Absence Form with the following noted:

- Whether or not a substitute is necessary
- Which account code will cover the expense of the conference

PO Process: Once conference and expenses, if applicable, have been approved, a Purchase Order must be put in place. The PO can be issued in one of the following three ways:

- Made directly to the vendor if they accept Purchase Orders.
- Made directly to TD Bank if approval is given by one of the District's designated employees with a credit card (note: Instructional staff must request authorization by the Asst. Superintendent for Educational Programs; Non-Instructional staff must go through the appropriate Supervisor/Administrator).
- Made out to the employee who will be responsible for paying for the conference and expenses and then submitting the proper paperwork for reimbursement.

Expenses: The District will pay for actual reasonable and necessary expenses; such expenses include: Registration Fee, hotel room charges, transportation, (airfare, taxi, mileage reimbursement), parking/toll expenses, and expenses for meals. **NOTE:** Effective September 1, 2019, the District will reimburse for taxes that are paid on meals and out of State Hotel taxes.

Claims Process: To be reimbursed, a Claim for Expenses form must be completed and submitted to the Business Office for audit. The Claim Form should include the following:

- Receiving Copy of PO
- Registration Form
- Copy of Leave Form
- Proof of Attendance
- Proof of Payment
- Original Receipts

Audit: The District's Claims Auditor will review the claim form and all supporting documentation to ensure that the expenses were approved in advance and were legitimate expenses.