

Hiawatha Valley Teachers United/Education Minnesota-NEA-AFT

HVTU Website: <http://www.educationminnesota.org/hvtu/home.aspx>

For Audit Purposes: THIS FORM MUST BE FULLY COMPLETED **WITHIN 60 DAYS** OR BY THE NEXT GOVERNANCE BOARD MEETING.

OFFICIAL REIMBURSEMENT FORM

Name: _____ Social Security #: (last 4 digits only) _____

Home Address: _____ City: _____ State: _____ Zip: _____

Local: _____ Daytime Phone #: _____

HVTU Activity: _____ Date: _____ Place: _____

MILEAGE INFORMATION

of members
in car _____

Names:

Starting address: _____

Destination address: _____

Return address: _____

of round trip miles _____

Mileage Rate: Car and driver, 58¢/mi.
Each additional rider, 7¢/mi.

EXPENSE INFORMATION

(Attach original receipts)

Mileage (subtotal from above) \$ _____

Motel/Hotel \$ _____

Meals \$ _____

Supplies \$ _____

Postage \$ _____

Telephone \$ _____

Registration \$ _____

Miscellaneous \$ _____

Conv./Workshop Exp. \$ _____

GRAND TOTAL \$ _____

SIGNATURE _____
Reimbursement Recipient

DATE _____
Date Submitted

DO NOT WRITE IN THIS SPACE

Draft # _____ Date _____

SIGNATURE _____
HVTU Treasurer

SIGNATURE _____
HVTU Co-President or Designee

BUDGET INFORMATION

_____ Governance Board
_____ Special Project Fund
_____ Administrative
_____ Negotiations
_____ Legislative Affairs/Political Action
_____ Professional Issues
_____ ER & D
_____ Conv./Workshop _____

Crisis Fund Information

_____ Reason _____

MAIL FORM & ORIGINAL RECEIPTS TO:

Kiel Koehler, HVTU Treasurer
214 Market Street
Winona, MN 55987

All reimbursement expense forms **must** have an address, a signature, **and** the last four digits of a member's Social Security number on them. Forms will be returned to individuals if the above information is missing. The expense reimbursement is attesting that the expenses listed are a true and complete representation of actual costs incurred, that they correspond to the event and that they conform with the guidelines designated below.

The below information pertains to member expenses reimbursable by Education Minnesota and Hiawatha Valley Teachers United (HVTU).

- **Receipts:** **Original, itemized receipts** are required for all airline tickets, lodging, taxi fare, dependent care, and parking fees. Additionally, submit **original receipts** for any other eligible expense of \$10 or more. If reimbursement is requested for an item exceeding \$10 and an original receipt is not attached, that amount will be reduced to \$10. Documentation must be written on all receipts including 1) date, 2) meeting (reason and place) or reason for expense, and 3) names of people participating in the meal or expense.
- **Mileage:** Mileage is reimbursed at the IRS rate in effect on January 1st and remains in effect until the following January 1st. At no time will the rate be higher than the IRS rate. To encourage carpooling, members may claim an additional .07 cents a mile per participant passenger. The additional reimbursement is taxable income and must be reported to the IRS.
- **Meals:** Actual cost, including tax and gratuities, for meals will be reimbursed to a daily maximum of \$70. When meals are included as part of the event, deductions from the daily maximum will be made as follows: \$15 for breakfast, \$20 for lunch, and \$35 for dinner. **Original, itemized receipts are required for meals in amounts of \$10 or more.** Alcoholic beverages are not reimbursable.
- **Lodging:** Education Minnesota will reserve rooms and arrange for direct billing of each member room for the number of authorized nights at the authorized properties. Members are encouraged to share rooms when possible. If there is only one participant or a roommate assignment cannot be made, the single/double rates will be reimbursed. Expenses for additional occupants are not reimbursable. For direct-billed rooms, members must pay for any nights not authorized for payment as well as any incidental charges incurred for movies, fitness room, bar tabs, telephone calls, and other incidental charges when checking out. Members may place their meal charges on their room account.
- **Substitute Pay (Release Time):** Substitute pay (Release Time), when necessary, will be reimbursed to the school district or local (upon written verification) when members are requested to attend meetings on workdays. Members are encouraged to use free locally negotiated leave before requesting substitute pay reimbursement.
- **Designated Travel Agent:** Travel Specialists, Inc. in St. Louis Park is our designated travel agent. Please make all travel arrangements through them. Call: 952-544-1151 / 1-800-334-6172; FAX: 952-544-0597.

Costs incurred by HVTU that result from cancellations or no-shows will be the responsibility of the participant, except in cases of emergencies.

Consult the "Education Minnesota Financial Policies for Governance and Members" document for complete wording and other financial policies in effect. Feel free to contact the HVTU Treasurer for clarification of any of the above stated policies.

Updated 01-17-2019 for 2019 on Garden Spring Green paper

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