

MOUNT PLEASANT COTTAGE SCHOOL UNION FREE SCHOOL DISTRICT**SUBJECT: GUIDELINES FOR USE OF CLAIM FORMS**

Claim forms are for the use of employees for reimbursement of their personal use of money for miscellaneous work related expenditures, when it is not feasible or economical to use a purchase order.

The procedures for completing a Claim Form are as follows:

- 1) Claim forms used by employees are not to exceed one hundred fifty dollars (\$150).
- 2) All appropriate original receipts must be attached. Reimbursements will not be approved if copies of receipts are used. In circumstances where a personal check or credit card is used, a copy of the check front and back or credit card statement will be acceptable. If a gift certificate is purchased, a copy of the certificate with the student's name identified on it will also be required with the receipt.
- 3) Only one employee can submit for reimbursement per receipt.
- 4) Proper types of receipts include:
 - a. Store register tapes showing the store name/description of item/date.
 - b. Invoices with company letterhead listing the employee as the purchaser and stamped paid in full.
 - c. Employee credit card statement and shipping document (if purchased by phone).
 - d. Copy of front and back of canceled check along with order form or registration form. For meals over twenty-five dollars (\$25), an itemized receipt is required (these receipts are now standard in most restaurants). All costs for alcoholic beverages need to be deducted.
- 5) The complete budget code must be entered, or the claim form will be returned to the Supervisor, which could delay processing.
- 6) Claim forms are not to be used to pay for contractual services such as for bus transportation or field trip admissions. In those cases a purchase order should always be used.
- 7) Supervisor's approval is required.