

## AFSCME LOCAL 2620 – REIMBURSEMENT CLAIM FORM

FULL NAME (**Print**) \_\_\_\_\_ HOME NO. \_\_\_\_\_ WORK NO. \_\_\_\_\_

HOME ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

UNION POSIITON (**Circle one**)    Member        Steward        Executive Board

CLASSIFICATION: \_\_\_\_\_ WORKSITE: \_\_\_\_\_

**ORIGINAL RECEIPTS ARE REQUIRED FOR ALL EXPENSES (EXCEPT MILEAGE & PARKING METERS)**  
**(See other side for Explanation of Expense Categories & Reimbursement Policy)**

Date	Purpose Be specific – Title of Meeting-Location For example: CDCR Stewards Mtg - Burbank	Travel (Mileage roundtrip)	Airfare Cost to You	Parking, Tolls or Meter				Other Expenses Incurred	Total Across All Expense	Codes Office Use Only
<b>SUBTOTAL</b>										
<b><i>MINUS MONEY OWED TO THE UNION [ FOR OFFICE USE ONLY ]</i></b>										
<b>TOTAL AMOUNT TO BE REIMBURSED</b>										

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ **Total Amt Due:** \_\_\_\_\_

**SEND ALL CLAIMS AND RECEIPTS TO : AFSCME LOCAL 2620, 514 SHATTO PLACE #215, LOS ANGELES, CA 90020**

Acct #	Acct #	Acct #	Acct #	Acct #	Acct #
Amt.#	Amt.#	Amt.#	Amt.#	Amt.#	Amt.#

## **REIMBURSEMENT POLICY**

Originally adopted by Executive Board Meeting 3/21/87; Amended 95,97-99, 02-05, 07, 08, 09

### **POLICY**

AFSCME, Local 2620 tries to make it as easy as possible for Union activist to participate in Union activities by reimbursing legitimate required expenses. The Union acknowledges that it has an obligation to the Unit 19 employees who pay dues and agency fees to ensure that expenses are reasonable documented and justified whenever required, approved in advance except in unusual situations and reimbursed timely after properly completed claim forms have been submitted.

Following are the typical expenses which the Union routinely reimburses. Please note that some items require advance Executive Board approval and other are limited. Any expenses not listed below, any exceeding the stated limits, and any requiring expressed Board approval will not be reimbursed without satisfactory justification and specific Board action; claims containing these expenses will not be reimbursed until after the Board has decided them. All requests for special approval should be directed to the appropriate Vice-President (Northern or Southern), who will forward them for action.

All claims reimbursements must be submitted within 3 months after the date that the event or expenditure occurred. All claims should be submitted either in person or by mail to the current AFSCME Local 2620 Treasurer or to the union office.

Any claim that is submitted for an event or expenditure that is not within the 3 months time span will not be paid unless extenuating circumstances prohibited the claimant from submitting the claim. In such a case, the claimant must submit any reasons for the delinquency of the claim to the Executive Committee/Executive Board for approval in paying the claim.

### **DEFINITIONS**

- 1) Travel: Mileage Rate will be in accordance with the government rate.  
Mileage round trip or airfare, whichever is less, parking (at airports, long-term only), bridge tolls; airfare reimbursed at the rate of a ticket purchased at least 7 days in advance (unless event is less than 7 days away from notice). Parking meter expenses will also be reimbursed. All receipts are required in order to be reimbursed.
- 2) Lodging: Shared lodging (two AFSCME members to a room) not to exceed \$140 plus tax per room. If shared lodging is not possible, single occupancy rate may be reimbursed with prior Board approval. Members who wish to have a single room or share a room with someone other than another AFSCME member may do so by paying the amount of the room charge which is above the amount of half of the double-occupancy rate. Room service charges, tips, movie rentals, honor bar items, etc. will not be reimbursed. All receipts are required in order to be reimbursed.
- 3) Meals: For Executive Board, Executive committee, and Occupational Committee Meetings-actual expenses. During approved travel-up to \$6.00 Breakfast: \$10.00 lunch: \$18.00 dinner. Receipts required showing actual expenses. All contract provisions and limits will apply.
- 4) Other Expenses: May include approved postage, lodging, or other expenses; subject to Board approval. All receipts are required in order to be reimbursed.

- 5) Allowance: based on the members hourly salary, per 8-hour day. All necessary forms (W-4, Supervisory Approved Vacation, and copy of pay warrant) are to be attached on a separate claim from other reimbursement claims
- 6) Reasonable Accommodation: The Union will make reasonable accommodation for known disabilities; all requests should be made on a "Reasonable Accommodation" form or simply in writing, and must be accompanied by appropriate documentation of disability and need for requested accommodation.

### **EXECUTIVE BOARD & COMMITTEE REIMBURSEMENTS**

- 1) Travel: Board meetings, representation duties, Steward Council
- 2) Telephone: Attached receipts for actual calls and identify Union calls;
- 3) Other Expenses: Expenses incurred by in representation (photocopying)
- 4) Meals: Expenses occurred during long travel to and from meetings.

### **OCCUPATIONAL COMMITTEE REIMBURSEMENTS**

- 1) Travel: To and from occupational committee meetings
- 2) Telephone: Same as Board.
- 3) Other Expenses: All photocopying and mailings should be done through the union office
- 4) Meals: In conjunction with travel to/from occupational committee meetings

### **OTHER REIMBURSEMENTS**

- 1) Negotiating Team: Travel, lodging, meals, allowance or lost actual wages
- 2) Steward Training: By Board approval
- 3) International Conv: By Board approval
- 4) Local 2620 Conv: By Board approval
- 5) Council 57 Delegates: Travel and Lodging
- 6) Executive Committee/Executive Board – approved conferences or conventions.

### **ANY DEPARTURES FROM ANY OF THE FOREGOING REQUIRE EXPRESS BOARD APPROVAL**