

VICTORY LODGE 1725 EXPENSE FORM

Name: _____ Date: _____

Home Phone: _____ Work Phone: _____

Employer/Dept: _____

Approved Reason: _____

Signature: _____

Expense Report

Travel Expenses, Per Diem, & Business Expenses

	MON	TUE	WED	THUR	FRI	SAT	SUN	TOTAL
Month/Day								
Lodging Amt.								(5)
City Code								
Per Diem								(6A)
Taxed - Per Diem								(6B)

Other Travel:

Conference/Covention Registration: (A) _____

Car Rental: (B) _____

Parking and/or Taxi: (C) _____

Other Travel: (D) _____ (A)+(B)+(C)+(D)=(7)

Business Expenses:

Supplies: (E) _____

Phone/Postage etc. : (F) _____

Other Expenses: (G) _____ (E) + (F) + (G) = (8)

OFFICE USE ONLY

See Reverse Side for Form Instructions and Lodge Travel Policy

Lodging Expense(5): _____

Per Diem Expense(6A): _____

Tax Per Diem (6B): _____

Other Travel(7): _____

Business Expenses(8): _____

Less Advance Check: _____

ATTACH ALL RECEIPTS

Approved By: _____ Date Signed _____

Trustees Sign Below: _____

By Signing this report I **agree** to submit to the union hall a **written report** (word document form) for the function I attended. This is a requirement per our Bylaws, Article V, Section 2, sub-section d. Also I will bring receipts for approved union business expenses such as; Event Registration, Hotel (zero Balance) , Car Rental (**Pre-Approved by the President and Treasurer** - no luxury cars or convertibles), Gas, Parking, tolls, mileage (paid in lieu of car rental, tolls, & gas), airfare (if not able to travel on pass - **purchase lowest rate available**), taxi (to and from the approved function), or supplies/postage to be used to reconcile my expense report. Expense reports are to be reconciled in a timely manner after the function is over.

Victory Lodge 1725 Travel Policy

- 1) Lodging: It is the member's responsibility to personally make reservations, deposits (if required) and make the final payment for lodging. The local lodge will NOT make direct payments for lodging or lodging deposits.
- 2) Mileage: Mileage will be paid only for the approved out of city/station union business related travel in accordance with **VL1725 Bylaws Art. 4 Sec 2 E.** and the IRS schedule if mileage is paid. Car rental's (if used) will be reimbursed rental/insurance/gas/tolls.
- 3) Other Travel: Other Travel is any expenses incurred for transportation to/from an approved union business event. First class upgrades will only be reimbursed if coach is unavailable.
- 4) Car Rental: **Must be pre-approved with the President and Treasurer** before renting. It is the member's responsibility to obtain the most reasonable rate and make reservations and payments for car rental. Convertibles and Luxury Cars **will not be approved**. Loss Damage Waiver Insurance will be paid.
- 5) Taxi: If a member uses a taxi for approved out of city/station union business, taxi service will be paid to and from the function/airport and a receipt indicating purpose for each taxi travel occurrence must be provided. When all possible, try and use **UBER** as they are represented by the IAMAW.
- 6) Parking: Reimbursement will be made for parking in the most economical are available (long term, not daily or hourly) for business travel days only.
- 7) Per Diem: Per Diem will be paid in whole day amounts in accordance with the IRS schedule 1542. Per Diem for days spent at the William W. Winpisinger Education & Technology Center at Placid Harbor or at Carolina Labor School - UNC Wilmington will be a **taxable rate at \$20.00 per day (not advanced)**.
- 8) Per Victory Lodge 1725 Bylaws: Article V Section 2, Sub-section D: **"The Delegate shall submit a written report of the function attended, to be posted at the local lodge hall, at the time the member submits their expense report for expenses incurred."**

Advance form Instructions

Please print name (full legal name), Date, Home/Cell phone number, Work phone number, Employer & Department, and **sign your name**.

Advances

Victory Lodge 1725 will advance Convention/Conference Registration, Lodging Expenses and Per Diem only. Per diem is calculated from the IRS schedule 1542. **Taxable per diem is not advanced**. Indicate the dates you will be out of town on approved Union Business, the amount of lodging expenses, the city code and the per diem amount.

Advance Policy Agreement

Print your name, sign your name and write down the approved union business function you will attend. Read the box indicating you understand you must turn in a report on said function to the local at the time you reconcile your expense report. **Advances and Expense Reports must be reconciled in accordance with Article 4 Section 2 (A) (B) (D) (E).**

Please **DO NOT** write inside the "OFFICIAL USE ONLY" Box. The Trustees and/or office staff will complete this area.

Please initial accepting/understanding the Victory Lodge Policy: _____