



# DISCUSSION LEADER REQUEST FOR REIMBURSEMENT

Please submit only one request per course/event.  
 Please review the **Expense Reimbursement Policy** on the reverse of this form. As a membership organization, The Society has a commitment to controlling costs and appreciates your consideration of its policies.

**Attach receipts for all expenses.**

Mail completed form with receipts to:  
 Oklahoma Society of CPAs  
 Attention: Learning Manager, Conferences  
 1900 NW Expressway, Suite 910  
 Oklahoma City, OK 73118

OR

E-mail completed form with receipts.

Questions? (800) 522-8261 or [cpe@oscpa.com](mailto:cpe@oscpa.com)

Name of Course/Event:

Date of Course/Event:  Location of Course/Event:

### CONTACT INFORMATION

Leader Name:  SS# (for Form 1099):

Direct Phone:  Ext.:  Cell Phone:

E-mail:

### REIMBURSABLE EXPENSES

<b>TRANSPORTATION</b>	<b>AMOUNT</b>
Airfare (Coach rate) <input type="text"/>	\$ <input type="text"/>
Location Transportation (bus, cab, shuttle) <input type="text"/>	\$ <input type="text"/>
Auto (miles) <input type="text"/> @ \$.54.5 /mile \$ <input type="text"/> Parking \$ <input type="text"/> Tolls \$ <input type="text"/>	\$ <input type="text"/>

**MEALS**

Breakfast \$:  Lunch \$:  Dinner \$:  \$

**OTHER**

Lodging/ Overnight Stay:  \$

Other (please explain):  \$

**TOTAL REIMBURSEMENT REQUESTED:**

Who should payment be made to:

Full Name:

Firm/Company (optional):

Address:  City, State, Zip:

I have read and agree to the terms of The Society Expense Reimbursement Policy.

Signature:  Current Date

## EXPENSE REIMBURSEMENT POLICY

- 1) Reimbursement for airfare is limited to coach fare or its equivalent.
- 2) Reimbursement for other out-of-pocket expenses is confined to costs of local transportation, automobile mileage, parking, tolls, meals, lodging, tips, etc. related to the conference or seminar. **Cost of non-conference- or seminar-related telephone calls, valet service, laundry, health club fees, in-room movies, mini-bars and other personal expenses will not be reimbursed.**
- 3) Reimbursement of meals shall not exceed \$75 per day per person. It should also be notated if any meal charge covers more than one person's food and/or beverages.
- 4) Reimbursement of parking charges at airports shall only cover the equivalent of long term/economy parking or garage parking. If airport parking charges are submitted for other rates (i.e. hourly), the rate of \$15 per day will be reimbursed.
- 5) Expensive methods of surface travel such as car rental should be avoided if it is less expensive to use cabs or shuttle service.
- 6) Original receipts should support all expense items in excess of \$25. Charges for airline travel **MUST** be supported by the passenger coupon portion of the ticket. Hotel charges **MUST** be supported by an itemized bill with evidence of payment. Original documentation is requested in all cases. In unusual circumstances, if originals are not available, copies will be accepted. **Expenses that are not properly documented will not be reimbursed.**
- 7) Requests for reimbursement ordinarily should be submitted within sixty days after incurred. In no event, however, will requests for reimbursement be honored for expenses incurred during a fiscal year if submitted more than thirty days after the close of that fiscal year which ends on April 30.

## EXPENSE REPORT

**Course/Event Name, Date & Location:** List the event for which you were a discussion leader, the location and date(s).

**Transportation:** List actual expense incurred for air, bus, car rental, cab fare or shuttle. Automobile mileage figured at current IRS rate.

**Meals and Tips:** Out-of-pocket expense for meals and tips in conjunction with the conference or seminar.

**Other:** List here actual expense for hotel accommodations. **Do not list an expense if paid by a master account of The Society.** List out-of-pocket expenses for conference- or seminar-related expenditures not covered elsewhere.