



# Jackson Preparatory & Early College

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## Reimbursement Policy

Staff or volunteers may on occasion be required to pay expenses consequent on their employment out of their own pockets. Under certain circumstances, as outlined in this policy, these expenses may be reimbursed by the Academy.

The purpose of this policy is to spell out under what circumstances reimbursement of expenses may occur on behalf of the Academy, and the process for doing so. This policy relates to both staff and volunteers acting on authorized academy business.

The Academy will reimburse its staff (including volunteers) expenses incurred by them on behalf of Jackson Preparatory & Early College or in the course of Academy business so long as such expenses are:

- (1) Reasonable and
- (2) Authorized.

Reimbursement of reasonable but unauthorized expenses may be made on an *ex gratia* basis at the discretion of the President in exceptional circumstances only.

Staff and volunteers incurring authorized expenditure must, wherever possible, receive, retain and produce receipts, invoices, vouchers, tickets, or other evidence of such expenditure.

## Prohibited reimbursements

The Academy will not reimburse staff or volunteers for:

- Unauthorized expenses
- Expenses claimed by an employee as a tax deduction
- Expenses normally recoverable from a third party
- Claims for purchases that are required to be made under a Jackson Preparatory & Early College purchase order
- Expenses that are not incurred for academy purposes
- Late payment interest on credit cards
- Parking, traffic, or other fines and penalties

## Travel expenses

- Employees and volunteers will be reimbursed for the most direct and economical mode of travel available, considering all of the circumstances.
- Employees and volunteers will not be reimbursed for additional costs incurred by taking indirect routes or making stopovers for personal reasons.
- Use of an employee or volunteer's own vehicle for work-related travel will not be reimbursed by way of an all-inclusive mileage allowance,
- Trip cancellation insurance is not eligible for reimbursement.



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## Accommodation expenses

- Employees and volunteers will be reimbursed for moderate accommodation expenses, considering all of the circumstances.
- Employees and volunteers will not be reimbursed for items of a personal nature charged to a hotel account.

## Meals

- Employees and volunteers will be reimbursed for reasonable and appropriate meal expenses actually incurred while on Academy business.

## Provision of hospitality

- Employees and volunteers will be reimbursed for hospitality expenses incurred in the course of Academy business, as appropriate.
- Appropriate hospitality charges include events hosted or sponsored for the purpose of promoting the Academy's work or enhancing its image, and include meals that are related to the transaction of Academy business.
- When Academy employees and/or volunteers dine together while on Academy business, it is appropriate for the **senior person** (if any) to arrange payment and submit the claim for reimbursement.

Advance payments may be authorized where appropriate. Such payments will be subtracted from the amount of any later reimbursements. If expenditure is, for whatever reason, not incurred then any advance payments made, or any unspent portion of such payments, must be returned.

Fixed *per diem* payments may be authorized where appropriate.

Except where *per diem* payments have been authorized, staff and volunteers incurring authorized expenditure must, wherever possible, receive and retain receipts, invoices, vouchers, tickets, or other evidence of such expenditure.

Staff and volunteers incurring authorized expenditure must submit requests for reimbursement to the designated person (depending on the sum in question) on the Reimbursement Request form

Except where *per diem* payments have been authorized, staff and volunteers incurring authorized expenditure must present all relevant original receipts, invoices, vouchers, tickets, or other evidence of such expenditure when seeking reimbursement. Where such evidence is for any reason lacking, statutory declarations may be sought.

Supervisors are responsible for determining if the expenses being claimed are reasonable given the circumstances.



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Claims that have not been properly prepared, authorized, or supported by adequate documentation will be returned to the claimant and the reasons will be given for not processing the claim.

All reimbursement requests must be received for reimbursement within two (2) months of the date expenses were incurred or reimbursement will be forfeited.