

## Professional Development Fund Instructions

**Overview:** Your professional development (PD) fund request must be approved by your site supervisor & your Stewards Coordinator. If asked, you must be able to prove how your PD request will directly benefit the projects you are working on at your site.

Type	Process	
	Option 1	Option 2
<b>Lodging and Flights</b> <i>**you will not receive the government rate at hotels since you are not a federal employee</i>	Book a room or flight yourself and submit an expense reimbursement form.	Contact your Program Coordinator and ask to set up an Egencia account. Egencia is our specialized website similar to Travelocity. <ul style="list-style-type: none"> <li>Request your hotel and/or flight in Egencia and your Program Coordinator will approve it. Once the booking is approved, the charge will go to the Stewards Program. Please try to make these requests on a Mon-Fri so your Program Coordinator can approve it before any costs change.</li> </ul>
<b>Ground Transportation</b>	Keep all itemized receipts from cabs, uber, car rentals, etc. and submit a reimbursement form.	n/a
<b>Mileage or Gas Reimbursements</b>	<u>Using Personal Vehicle:</u> Submit a mileage reimbursement using the expense reimbursement form. <ul style="list-style-type: none"> <li>If you are driving your personal vehicle, please ensure we have a copy of your personal auto insurance on file prior to your travel departure date. Google map(s) of route must be included.</li> </ul>	<u>Using Work or Government Vehicle:</u> collect gas receipts and submit reimbursement form.
<b>Food</b>	Keep itemized receipts from all meals and submit with expense reimbursement form as a combined PDF file.	Use Per Diem Request Form <ul style="list-style-type: none"> <li>Must be submitted at least 2-3 weeks prior to your travel departure date.</li> </ul>
<b>Conferences or Workshops</b>	Book conferences and workshops yourself and submit an expense reimbursement form.	Stewards can book on your behalf w/ Stewards credit cards <ul style="list-style-type: none"> <li>Send a link to the conference/workshop you're attending and take screenshots of your answers to each registration field beforehand. Send your Program Coordinator the document w/ your screenshots (i.e. meal preferences, dates of stay, workshops attending, personal contact information, etc.)</li> </ul>
<b>Supplies</b>	Purchase these items yourself and then submit an expense reimbursement form with the itemized receipts.	n/a

**\*\*Please thoroughly review the following pages for instructions on completing an Expense Reimbursement form & a Per Diem Request Form\*\***

# Expense Reimbursement Form Instructions

1. Fill in the top portion of the form, pictured below.

Payee Name: _____	Date: _____	Agreement Number
Program: <b>Select One</b>	Crew: _____	

1. Payee Name: Your Name
2. Program: STW:ES
3. Date: Date you are completing the form
4. Crew: Government agency you are working for/location (i.e. NPS, USFS, etc.)
5. Agreement Number: **leave blank**

2. Organize and Number Receipts. Number your receipts, starting with the number 1, and write/type the number in the upper corner of the receipt. ***We are only able to process itemized receipts.***

***We also do not reimburse for alcoholic beverages.*** Receipts must all be submitted as one document- NOT single attachments.

***If you purchase an alcoholic beverage:***

- ***cross beverage off receipt***
- ***cross off tax***
  - ***You will then only be reimbursed for the items on the receipt minus the alcohol and taxes.***

### Example of Itemized Receipt

Jimmy Johns #799  
1417 Farnam St  
402-614-1315

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03-10-2015 Chk# 140 Open 12:11 PM  
Tkr 586 Reg# 1 12:11 PM

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#10 Hunters Club	5.99
..Wheat	
ADD roast beef	1.50
<hr/>	
Med Fountain	1.50
Combo	-0.10
<hr/>	
Jimmy Regular Chips	1.25
<hr/>	
Restaurant Tax	0.25
<hr/>	
Subtotal	10.39
Sales Tax (7.%)	0.73
<hr/>	
<b>Total</b>	<b>\$ 11.12</b>

**\*\*\* PAID \*\*\***

Credit Tendered 11.12 Tip 0.00

### Example of a Non-Itemized Receipt

AJ'S NY PIZZERIA  
301 Poyntz  
Manhattan, KS 66502

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CREDIT CARD SALE

Card Number: xxxxxxxxxxxx9928  
Date: 03/11/2015 7:27 pm  
Auth Code: 181051  
Cashier: MM02  
Order: 321963  
Table:  
Server: MM02

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SUB TOTAL:                   \$15.51

Tip: \_\_\_\_\_

Total: \_\_\_\_\_

X \_\_\_\_\_

**3. Fill in the receipt details portion of the form.**

Receipt	Vendor	Business Purpose	Expense Account	Bill to grant or partner	Amount
1			Select Account		
2			Select Account		

1. Receipt Number – Enter the number of the receipt you are entering details for. Example, the receipt you labeled as number 1 in the upper left-hand corner will be receipt number 1.
  2. Vendor – Enter the vendor’s name. For example, Taco Bell, United Airlines, Holiday Inn, etc.
  3. Business Purpose – Enter the purpose of the receipt. For example, lodging, food, air fare, meals, etc.
  4. Account – Ignore this column. No entry required.
  5. Bill to Grant or Partner – Ignore this column. No entry required.
  6. Amount – Total charge for the numbered receipt. This amount must match the amount on the receipt.
  7. Total – This will add up for you automatically.
4. Address: leave blank, this will be directly deposited.
  5. **Notes:** Provide any notes or comments that you feel are relevant to the information you entered in the form. i.e. Added 20% tip to this receipt to get to total requested.
  6. **Delivery method:** leave blank.

**Sign your name next to *staff signature* and date the form.** Please make sure your supervisor signs under Approver Signature. **TYPED SIGNATURES WILL NOT BE APPROVED UNLESS YOU USE AN ELECTRONIC SIGNATURE.**

## Mileage Tracking Section

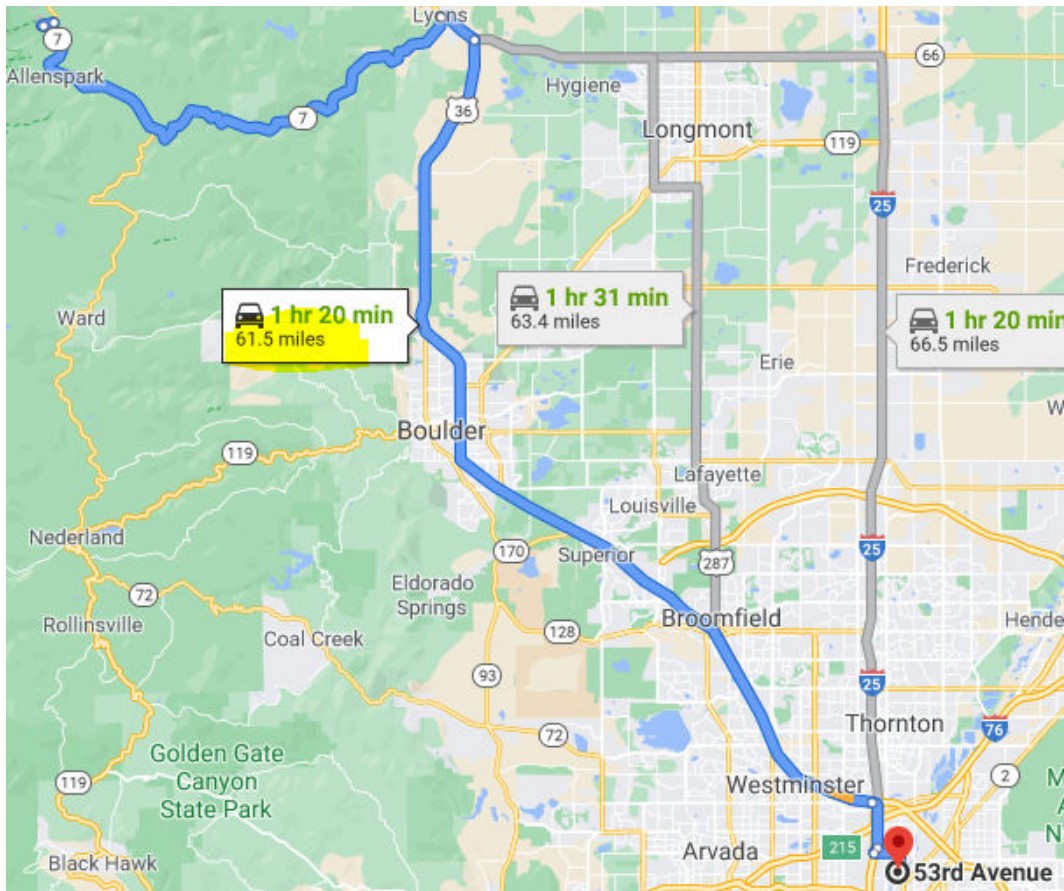
All mileage will be automatically calculated when you enter in the total miles traveled. Total will be added to the total reimbursement value.

- **Driving Personal Vehicle:** We are legally required to have a copy of your vehicle insurance on file in the case of an accident.
- **Driving Government Vehicle:** keep gas receipts and turn them in as you would any other receipt.
- Include in notes section how you achieved the amount listed. See picture below:

### **Mileage Tracking and Reimbursement** (use current IRS rate)

Date	Business Purpose	Miles	Rate	Amount	Notes
3/5/2021	Data collection training	61.5	0.56	\$ 34.44	Travel from park to Denver
3/12/2021	Data collection training	61.5	0.56	\$ 34.44	Travel back to park from Denver
			0.56	\$ 0.00	
			0.56	\$ 0.00	
			0.56	\$ 0.00	

Include picture of google map to prove how you achieved the number of miles you are requesting to be reimbursed for. The miles in the google map route you took should match the miles you entered in the expense reimbursement form. Example below:



**Final Step:** Email the reimbursement with receipts and maps (if mileage is being requested) as one document (not multiple attachments) to your Program Coordinator. Don't forget the signatures!

Continue to next page to review detailed Per Diem request instructions

# Stewards Per Diem Request Form Instructions

1. Complete "Per Diem Request Information"
2. To complete the second portion of the spreadsheet, visit:
  - <https://www.gsa.gov/travel/plan-book/per-diem-rates>
  - a. Search by City, state or zip (i.e. if you are traveling to DC, type in DC information here)- click find rates.
  - b. Scroll down to the Meals & Incidentals (M & IE) section where you will find a table of amounts per meal.
  - c. In the Per Diem spreadsheet, enter the amounts listed in the row of your primary destination for each day you are traveling under Breakfast, Lunch, Dinner and so on.
    - i.B ecause our spreadsheet is broken apart by meal you do not need to pay attention to the first and last day of travel.

ii. See example below:

**Meals & Incidentals (M&IE) Breakdown**

Use this table to find the following information for federal employee travel:

**M&IE Total** - the full daily amount received for a single calendar day of travel when that day is neither the first nor last day of travel.

**Breakfast, lunch, dinner, incidentals** - Separate amounts for meals and incidentals. M&IE Total = Breakfast + Lunch + Dinner + Incidentals. Sometimes meal amounts must be deducted from trip voucher. [See More Information](#)

**First & last day of travel** - amount received on the first and last day of travel and equals 75% of total M&IE.

Filter Results...

Primary Destination	County	M&IE Total	Continental Breakfast/Breakfast	Lunch	Dinner	Incidental Expenses	First & Last Day of Travel
Standard Rate	Applies for all locations without specified rates	\$55	\$13	\$14	\$23	\$5	\$41.25
Beaverton	Washington	\$61	\$14	\$16	\$26	\$5	\$45.75
Bend	Deschutes	\$61	\$14	\$16	\$26	\$5	\$45.75
Clackamas	Clackamas	\$56	\$13	\$15	\$23	\$5	\$42.00

Meal/Travel Expense Summary							
	Breakfast	Lunch	Dinner		I&E	Total	
9/16/2019	\$ 14.00	\$ 16.00			\$ 26.00	\$ 5.00	\$ 61.00
9/18/2019	\$ 14.00	\$ 16.00			\$ 26.00	\$ 5.00	\$ 61.00
9/19/2019	\$ 14.00	\$ 16.00			\$ 26.00	\$ 5.00	\$ 61.00
9/20/2019	\$ 14.00	\$ 16.00			\$ 26.00	\$ 5.00	\$ 61.00
9/21/2019	\$ 14.00					\$ 5.00	\$ 19.00
(insert date)							\$ -
(insert date)							\$ -
(insert date)							\$ -
							<b>Total Sum:</b>
							\$ 263.00

\*\* in this example, my travel ends in the morning, therefore I do not need lunch or dinner. Instead of doing the first and last day of travel, I simply leave out the meals I do not need.

- d. Save a copy of the request, have your supervisor sign it and send it to your Program Contact paying special attention to what pay period we are currently in so you'll know when to expect a direct deposit.

\*\*If you have questions, please alert your Program Contact for help.