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MEMO

To: General Lost Timers, All Staff and Executive Board

From: Robert Li, Head of Operations & Labor Relations

Subject: Eff 6/24/23, General Lost Timers Eligible for 25 Miles

On June 24, 2023, our SEIU 1021 Executive Board improved the Local's Member General Expense Reimbursement Policy and Procedure and Member Expense Reimbursement Request Form to benefit our member lost timers in the following way:

Member lost timers, approved per the Local's Lost Time Policy, are now eligible for mileage reimbursement for mileage (excluding commute miles) that are incurred on and after June 24, 2023 and will no longer be subject to the "25 round-trip miles exclusion" rule.

Resulting reimbursement submission volume increases will be managed by the following union operational changes:

1. All Lost Timer reimbursement submissions will be processed once per month
2. All Lost Timer reimbursement submissions will be submitted on Concur, the Local's Reimbursement Application

The above two (2) new union operational changes will go into effect in the following manner:

June 24 ~ July 23, 2023:

Lost Timer reimbursement submissions during the above time window will continue to be processed as usual. Lost Timers without a Concur account may continue to use the Member Expense Reimbursement Request Form for this period. Lost Timers that have Concur accounts will continue to submit reimbursement requests through this application.

July 24, 2023 and Forward: "Once per Month" processing begins

The "once per month" processing operational change goes into full effect July 24, 2023. Submission deadlines will be the 15th of every month with the first deadline being August 15, 2023. All lost timer reimbursement submissions will only be processed through Concur.



SEIU LOCAL 1021 MEMBER EXPENSE REIMBURSEMENT REQUEST

NAME: _____ SOCIAL SECURITY # _____

HOME ADDRESS: _____

CITY: _____ ZIP: _____

EMPLOYER: _____

EMAIL: _____ PHONE: (_____) _____

**CHECK ALL APPROPRIATE BOXES
ITEMIZE ALL EXPENSES AND ATTACH RECEIPTS:**

PARKING: _____ \$ _____

MEETING/EVENT SUPPLIES (specify): _____ \$ _____

MEETING/EVENT MEAL/FOOD (specify): _____ \$ _____

Attach list of all members and titles for whom a meal or food was purchased (required).

MILEAGE: Total round-trip miles _____ minus 25 miles x IRS rate = \$ _____

STARTING ADDRESS (if not home): _____

CITY: _____

DESTINATION (street address): _____

CITY: _____

TOTAL: \$ _____

MEETING/EVENT DATE: _____

MEETING/EVENT LOCATION: _____

MEETING/EVENT ADDRESS (street) _____

City: _____ Zip: _____

PURPOSE/NAME OF MEETING/EVENT: _____

OFFICE
USE ONLY

LM2

APPROVED:

MEMBER SIGNATURE: _____ DATE: _____

AUTHORIZING SIGNATURE*: _____ DATE: _____

*Local 1021 president, treasurer, director, industry chair, or committee chair.

(Over)

HOW TO CLAIM EXPENSE REIMBURSEMENT

- (1) Complete the Local 1021 MEMBER EXPENSE REIMBURSEMENT REQUEST form—PRINT all information (we must be able to read your form to honor your claim).
- (2) Indicate the reason you are requesting reimbursement (i.e., mileage, parking, etc.) and the amount of the expense. You must submit original, dated receipts (not credit card receipts) for parking, bridge tolls, meals, etc. in order to be reimbursed.
- (3) **BE SURE TO COMPLETE ALL INFORMATION AND SIGN THE REQUEST FORM**—whoever authorized the reimbursement or the treasurer must also sign the form.
- (4) The completed form and receipts should be submitted to: SEIU Local 1021, 447 29th Street, Oakland, CA 94609

The following are examples of expenses that may be authorized for reimbursement:

MILEAGE/TRAVEL REIMBURSEMENT: Member volunteers who have been authorized—in advance—by the president, director, industry chair, or committee chair shall be reimbursed mileage when they are doing union business, e.g., bargaining, representation, approved events. Mileage will be reimbursed at the prevailing IRS business mileage rate. Members will be reimbursed for all miles driven over 25 round-trip miles. To be reimbursed, members must submit documentation of attendance at the event, meeting, etc. (e.g., an agenda or program) and MapQuest or other driving directions that indicate the departure address, destination address, and the number of miles driven.

Members on lost time per our SEIU 1021 Member Lost Time Policy who have been authorized – in advance – by the Local’s designated Local 1021 representative shall be reimbursed all non-commute mileage, at the prevailing IRS business mileage rate, when they are doing assigned lost time union business. To be reimbursed, members on lost time must submit, through the Local’s designated reimbursement application (Concur), documentation that indicates the departure address, destination address, and the number of miles driven.

PARKING: Members who have been authorized – in advance – by the president, director, industry chair, or committee chair shall be reimbursed parking for attending specified events, meetings, etc. To be reimbursed, members must submit documentation of attendance at the event, meeting, etc. (e.g., an agenda or program) and a receipt for the cost of parking. The local will reimburse at the economy parking rate of the facility used (airport, hotel, public parking, etc.).

MEALS/MEETING FOOD: If authorized to purchase a meal or food for a meeting, members are required to attach the receipt(s) and a list of all members and titles for whom a meal or food was purchased.

RECEIPTS AND DOCUMENTATION: In order for an individual to be reimbursed by the local, the following documentation and receipts must be submitted.

- Documentation must be submitted on the local’s official reimbursement form with all receipts and other necessary documentation attached.
- Original receipts, not copies or credit card receipts, are required for reimbursement. Copies of cancelled checks are not considered receipts. A bill, in itself, is not a receipt. Bills must be stamped “paid” by the vendor.
- Adequate documentation must include: date the expense was incurred, the nature of the expense (e.g., parking), a sufficiently detailed description of the purpose of the expense (e.g., travel to a meeting, food for a local event), location the expense was incurred (e.g., name and location of the restaurant, union office, hotel, etc.), the name and title of every person on whose behalf an expense was incurred (e.g., everyone whose meal/food was paid for);

The president, treasurer, industry chair, committee chair, or director shall carefully review documentation for accuracy before approving reimbursement.

Reimbursement requests and supporting documentation must be submitted within six (6) months of the expense being incurred. Reimbursement requests submitted with proper documentation and authorization will be processed within two (2) weeks of receipt by the finance department.

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Revised/adopted 9/19/10
Revised/adopted 6/24/23