



The Episcopal Diocese of Northern California

Expense Reimbursement Training Packet

2025 Expense Reimbursement & Check Request Form

- The 2025 Expense Reimbursement & Check Request Form
- Form Instructions
- Comments
- Completed Form Examples

The Episcopal Diocese of Northern California - 2025 Expense Reimbursement & Check Request Form

1 Payable to: _____ 2 Date Submitted: _____

3 Address: _____

4 Delivery Instructions: _____

Date 5	Description 6	Number of miles driven 7	Amount 8	INTERNAL USE ONLY	
				Account Name 9	Program or Classification Name 10

Total: \$0.00 11

12 Submitted by: _____
 13 Program Approval*: _____
 14 Office of the Bishop Management Approval*: _____

Date: _____ 15
 Date: _____
 Date: _____

Employees and volunteers (non-employees of the Office of the Bishop) will be reimbursed for the cost of transportation (airfare or other mode of transportation), lodging, and meals while traveling on diocesan business. Every reasonable effort should be made to contain costs for lodging and meals while traveling on Diocesan business. **Original receipts must be submitted with the Expense Reimbursement & Check Request Form to receive reimbursement.**

Employees will be reimbursed for travel mileage based on the Internal Revenue Service (IRS) business rate in effect. Effective January 1, 2025 this reimbursement rate is \$0.70 per mile. Travel mileage should be detailed in the "Description" above with the exact starting and ending location points and noted if the trip was one-way or a round trip.

Effective January 1, 2015, volunteers (non-employees of the Office of the Bishop) conducting diocesan committee, commission, and governing body business will be reimbursed for travel mileage at the IRS business rate upon special request with proper documentation. For 2025, this rate is \$0.70 per mile. If not requested, volunteers will be paid at the volunteer rate. For 2025, this rate is \$0.14 per mile. Volunteers must submit a complete Expense Reimbursement & Check Request Form no later than 45 days after the expense is incurred to receive reimbursement. A completed Form W-9 must be submitted with an **initial** request. Volunteers attending Diocesan Convention or Deanery meetings will not be reimbursed for mileage at the IRS business rate.

For travel mileage reimbursement, a Google Map (or similar program) map must be printed and submitted with the Expense Reimbursement & Check Request Form. The Google Map should include the detailed route from the starting point through the ending point.

* All Expense Reimbursement & Check Request Forms must have appropriate "Program Approval" and "Office of the Bishop Management Approval" prior to submitting a completed request.

Rev. 01/01/2025

Completed Expense Reimbursement & Check Request Forms must be submitted to:
 The Episcopal Diocese of Northern California
 2394 Fair Oaks Blvd., Sacramento, California 95825
 Tel 916.442.6918 Fax 916.442.6927 Web www.norcalepiscopal.org



Making Disciples, Raising Up Saints & Transforming Communities for Christ

2025 Expense Reimbursement & Check Request Form Instructions

1. **Payable to:** Name that should appear on the check.
2. **Date Submitted:** Date the check request was completed.
3. **Address:** The address where the check should be mailed or delivered (Street or P.O. Box, City, State, and Zip).
4. **Delivery Instructions:** How the check should be delivered. If an attachment should be mailed or delivered with the check, please state this and note if the original document should be included or a copy.
5. **Date:** The date the expense was incurred.
6. **Description:** Complete description of expense. If expense is for mileage, please note if the trip is round-trip or one-way and note to and from where the travel occurred.
7. **Number of miles driven:** Exact number of miles driven based on a Google map (E.G. 42.7). It is okay to only print a one way map and then double the miles for a round trip.
8. **Amount:** Exact amount of the expense. If you are requesting mileage, please multiply the number of miles by 70.0 cents (0.70). The submitter may elect to receive the volunteer rate of 14 cents (0.14) for mileage instead. Please recheck all amounts prior to submitting the form for approval.
9. **Account Name:** Internal use only.
10. **Program or Classification Name:** Internal use only.
11. **Total:** Please recheck the total by adding up all lines on the form to ensure the total is correct.
12. **Submitted By:** Signature of individual requesting expense. If approval comes from an email or mail correspondence, please write "See attached" on this line and include all correspondence and documentation. Please do not write another individual's name in if the request is being completed for another individual.
13. **Program Approval:** Signature of individual approving the request. This may also be the same individual submitting a request.
14. **Office of the Bishop Management Approval:** Signature of the Office of the Bishop individuals (Director of Operations or Canon to the Ordinary) who have the authority to approve the 2025 Expense Reimbursement & Check Request Form. This may not be the same name as the individual receiving a payment.
15. **Date:** The date the expense form is signed.

Comments

1. For calendar year 2025, only use the 2025 Expense Reimbursement & Check Request Form. Prior year Expense Reimbursement & Check Request Forms should no longer be used for 2025.
2. A round-trip Google Map (or similar program) map must be printed and submitted with the Expense Reimbursement & Check Request Form. (It is okay to print a one way map and double the miles for a round trip.) Remember the mileage is to the hundreds place (Eg. 42.7).
3. For receipts that are not on a printed 8 1/2 x 11 piece of paper, please tape the receipt(s) to a blank 8 1/2 x 11 piece of paper(s).
4. Please do NOT use staples. Paper clips or binder clips only.
5. Expense reimbursements must be submitted no later than 45 days after the expense is incurred to receive reimbursement.
6. If you have questions, don't hesitate to ask! kati@norcalepiscopal.org

The Episcopal Diocese of Northern California - 2025 Expense Reimbursement & Check Request Form

Payable to: Jane Doe

Date Submitted: 1/7/2025

Address: 555 Sample St. Sacramento, CA 95825

Delivery Instructions: Mail Check

Date	Description	Number of miles driven	Amount	INTERNAL USE ONLY	
				Account Name	Program or Classification Name
1/7/2025	Capital Deanery meeting, breakfast		\$89.54		
1/7/2025	Deanery mtg. round-trip mileage from St. Martin's to Trinity	41.00	\$28.70		

Total: \$118.24

Submitted by: Jane Doe

Date: 1/7/2025

Program Approval*: _____

Date: _____

Office of the Bishop Management Approval*: _____

Date: _____

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Employees will be reimbursed for travel mileage based on the Internal Revenue Service (IRS) business rate in effect. Effective January 1, 2025 this reimbursement rate is \$0.70 per mile. Travel mileage should be detailed in the "Description" above with the exact starting and ending location points and noted if the trip was one-way or a round trip.

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For travel mileage reimbursement, a MapQuest (or similar program) map must be printed and submitted with the Expense Reimbursement & Check Request Form. The MapQuest should include the detailed route from the starting point through the ending point.

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Rev. 1/1/2025

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Making Disciples, Raising Up Saints & Transforming Communities for Christ

SAMPLE STORE

1234 Sample St.
Sacramento, CA 95825
(555)555-5555
Jan. 7, 2025 7:35am

No.5555 Cashier: Jane

20 Breakfast pastries	66.00
1 Gallon of coffee	17.49

Subtotal: 83.49
Tax: 6.05
Total: 89.54

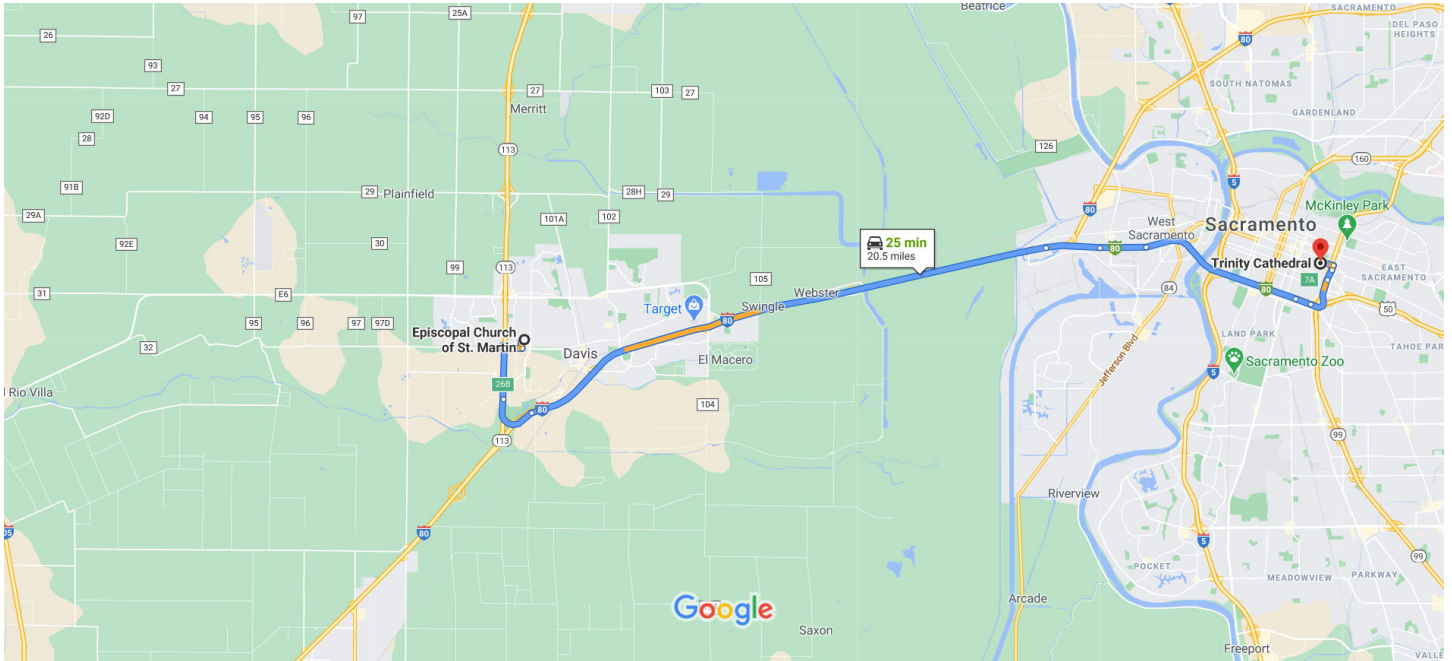
***** THANK YOU *****





Episcopal Church of St. Martin to Trinity Cathedral

Drive 20.5 miles, 25 min



Map data ©2020 Google 2 mi

Episcopal Church of St. Martin






640 Hawthorn Ln, Davis, CA 95616

Get on CA-113 S from Russell Blvd


- 3 min (0.8 mi)
- ↑ 1. Head west toward Hawthorn Ln
- 177 ft
- ↶ 2. Turn left onto Hawthorn Ln
- 377 ft
- ↶ 3. Turn left at the 1st cross street onto Sycamore Ln
- 0.1 mi
- ↷ 4. Turn right onto Russell Blvd
- 0.4 mi
- ⬆ 5. Use the right lane to take the State Route 113 ramp
- 0.2 mi

Take I-80 E and I-80BL E to 30th St in Sacramento. Take exit 7A from I-80BL E

- 18 min (19.4 mi)
- ⬆ 6. Merge onto CA-113 S
- 1.0 mi
- ↷ 7. Use the right 2 lanes to take exit 26B toward Sacramento
- 1.1 mi
- ⬆ 8. Merge onto I-80 E
- 10.7 mi
- ↑ 9. Continue onto I-80BL E/US-50 E/Capital City Freeway (signs for Sacramento/South Lake Tahoe)
- 1.1 mi

-  10. Keep left to continue on I-80BL E
0.9 mi
-  11. Keep left to stay on I-80BL E
3.3 mi
-  12. Use the 2nd from the right lane to take the Interstate 80 Business East exit toward Reno/CA-99 S/Fresno
0.3 mi
-  13. Keep left at the fork, follow signs for I-80 BUS/Reno and merge onto I-80BL E
0.8 mi
-  14. Take exit 7A for N St
0.2 mi

Drive to Capitol Ave

-  15. Use the left lane to turn left onto 30th St
 Pass by IHOP (on the right)
449 ft
-  16. Turn left before Wells Fargo Bank
 Destination will be on the left
0.3 mi

Trinity Episcopal Cathedral

2620 Capitol Ave, Sacramento, CA 95816

These directions are for planning purposes only. You may find that construction projects, traffic, weather, or other events may cause conditions to differ from the map results, and you should plan your route accordingly. You must obey all signs or notices regarding your route.