



## EXPENSE REIMBURSEMENTS

PESI will reimburse you for **reasonable** travel expenses associated with travel for the seminar. An example of a completed Expense Reimbursement Form can be viewed at [www.pesi.com/speakerinfo](http://www.pesi.com/speakerinfo) (click on the “Sample-filled out” link after the “Blank Expense Form” link).

Submit a completed form along with **copies of final, detailed receipts**. A receipt for each entry is required for reimbursement consideration. Please keep your original receipts for your tax records. Copies of credit card statements are not considered a valid receipt, and may only be accepted under extenuating circumstances.

The expense reimbursement form and receipt copies are to be submitted within 30 days following the seminar. The expense form and copies of your receipts may be submitted in one of the following ways:

- ✓ Email as pdf attachments to [expenses@pesi.com](mailto:expenses@pesi.com)
- ✓ Fax to 715-855-8139
- ✓ Mailed to PO Box 1000, Attn: Expenses, Eau Claire, WI 54702-1000
- ✓ Expensify Mobile App (email [jthorson@pesi.com](mailto:jthorson@pesi.com) for emailed invite to PESI’s free account)

Expense reimbursements are processed and reimbursed weekly. Every effort will be made to reconcile your expenses and deposit your reimbursement on Friday of the same week they are received in our office. Please note that expense submissions **must be received in our office by 10:00 am CST on Wednesday** in order to be reimbursed that same week.

**Hotel Room Charges:** Hotel charges for your overnight rooms should be charged on your personal credit card. Any incidentals (i.e. movies, phone calls, internet, room service, restaurant/lounge) are your responsibility. **PLEASE SUBMIT A COPY OF THE FINAL DETAILED FOLIO.** \*\*Note: Most hotels are reserved with PESI’s corporate credit card. These hotels appear on your itinerary. They should settle to your credit card. Some do not. Please verify which card settled it before adding to your expense form. If prepaid with PESI’s credit card, the receipt is still required. \*\*PESI will NOT cover additional nights lodging if there is a flight to get you home after your last seminar. If there is not a flight late enough, the extra night lodging will be covered by PESI.

**Meals and Other Expenses:** Meals are covered by your standard per diem which is currently \$75.00 per day for each full speaking day and/or full travel day. Please DO NOT SUBMIT RECEIPTS for meals and other miscellaneous daily expenses (i.e. meals, personal hygiene items, tips). If traveling or speaking for a half day, you will be reimbursed at a per diem rate of \$50.00. The per diem amount is added to your expense form and paid with your other expense reimbursements.

**Mileage/Personal Auto Use for Seminar-related Travel:** Keep track of the mileage related to using your personal auto for seminar-related travel. Record the mileage on your expense form. We will reimburse you at the current IRS Standard Mileage Rate in effect at the time of the seminars. Note: DO NOT include personal auto fuel, oil, insurance or maintenance as these are already considered in the IRS Mileage Rate.

**Rental Car Charges:** Economy and intermediate car rental expenses will be reimbursed only if the cost compares favorably to other options. Not all travel will require a rental car; there may be other options such as taxis, hotel shuttles, etc. Our Travel Manager Shannon will discuss these options with you when making reservations. **PLEASE SUBMIT FINAL DETAILED RECEIPTS (*estimates are not accepted*)**. These final receipts may be obtained by calling the agency or even quicker online through the rental agency's website.

- ✓ You must present a VALID DRIVER'S LICENSE & PERSONAL CREDIT CARD in order to pick up the rental car.
- ✓ Please check your auto insurance, travel insurance and/or credit card insurance policies before you travel and DECLINE the supplemental insurance options if your insurance policies have adequate coverage. Be cost conscious when renting a vehicle; additional options can almost double the actual rental cost.
- ✓ PESI will NOT cover the **FUEL SERVICE/PURCHASE OPTION**. These are often over-inflated prices and/or for an entire full tank of fuel. You will be responsible for those charges if you take this option.
- ✓ Car upgrades will NOT be reimbursed unless pre-approved by your planner or Shannon.
- ✓ Additional driver charges will NOT be covered.

**Non-Reimbursable Expenses:** PESI does not reimburse for the following:

- ✓ Fuel Service/Fuel Purchase/Refueling options on rental cars
- ✓ Additional/Optional/Supplemental insurances on rental cars
- ✓ GPS, Sirius XM Radio, NeverLost options on rental cars
- ✓ Vehicle class upgrades, additional driver, child seats, etc. on rental cars
- ✓ Restaurant, room service, movies, internet, phone calls, personal hygiene/medicinal incidentals
- ✓ Flight upgrades and/or change fees if personal choice, not weather-related
- ✓ Early bird check-in fees
- ✓ Advanced seat assignment fees
- ✓ In-flight internet access fees
- ✓ Bellman tips, curbside baggage fees & tips, valet parking tips
- ✓ More than one piece of checked luggage
- ✓ Companion Pet-related expenses (*unless pre-discussed licensed/certified service animal*)
- ✓ "Estimate" receipts – PESI auditors require final detailed receipts

**Often-questioned Covered Expenses:**

- ✓ 1<sup>st</sup> checked baggage fee each way WITH RECEIPT
- ✓ Rental Car Damage Waiver (LDW or CDW) only if you feel inadequately covered by personal auto insurance, travel insurance or credit card coverage
- ✓ Toll Pass Devices on rental cars
- ✓ Reasonable, customary tips for taxis

**Final Notes:** You will find a section on the Expense Reimbursement Form titled “Special Travel Notes.” Please use this section (or attached page/email) to bring attention to any travel disruptions, delays, etc. The Expenses team is not out there with you to know what happened and/or why receipts wouldn’t match your itinerary. Any oddity explanations would be most helpful in processing your reimbursement.