REIMBURSEMENT OF EXPENSES

POLICY NUMBER: NDIS FIN 14

INTENT

To outline procedures that must be followed in the reimbursement of expenses incurred on behalf of Real Living Options Association Inc.

DEFINITION

***Reimbursement**: to repay someone for work related expenses incurred and paid for out of their own pocket.*

POLICY STATEMENT

Real Living Options Association Inc. will reimburse its staff (including volunteers) any reasonable and authorised expenses incurred by them on behalf of the organisation or in the course of conducting Real Living Options Association Inc. business.

PROCEDURES

Travel Expenses

- Employees and volunteers will be reimbursed for the most direct and economical mode of travel available that has been approved by the General Manager and/or the Management Committee.
- Employees and volunteers will not be reimbursed for additional costs incurred by taking indirect routes or making stopovers for personal reasons.

Accommodation

- Employees and volunteers will be reimbursed for accommodation expenses that have been approved by the General Manager and/or the Management Committee.
- Employees and volunteers will not be reimbursed for items of a personal nature charged to a hotel account.
- When accommodation is provided by a friend or relative of the employee to whom the employee gives money or gift as compensation or as a sign of appreciation, the employee may claim an overnight accommodation expense at a negotiated amount beforehand.

Employee/volunteers Own Meals

- Employees and volunteers will be reimbursed where applicable for reasonable and appropriate meal expenses actually incurred while conducting business on behalf of Real Living Options Association Inc.
- Reimbursement will be negotiated beforehand between the General Manager and/or Management Committee and the individual.

When a Staff Member or Volunteer is Offering Hospitality on Behalf of Real Living Options Association Inc.

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

Advance Payments

- Advance payments may be authorised by the General Manager and/or Management Committee where appropriate.
- Such payments will be subtracted from the amount of any reimbursements.
- If reimbursement is sought for expenditure not previously approved, any advance payments must be returned.

Documentary Evidence

- Employees and volunteers incurring authorised expenditure must, wherever possible, receive and retain receipts, tax invoices, tickets or other evidence of such expenditure.

Requests for Reimbursement

- Employees and volunteers submitting requests for reimbursement must provide evidence of the expense as stated above.

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

Real Living Options Association Inc. Will Not Reimburse Staff and Volunteers for

- Expenses claimed by an employee or volunteers as a tax deduction.
- Expenses normally recoverable from a third party.
- Claims for purchases that are not required to be made by Real Living Options Association Inc.
- Expenses that are not incurred for business purposes.
- Late payment interest on credit cards.
- Traffic violations or other fines and penalties.

DELEGATIONS

Management Committee

- Approval for travel of General Manager incurring travel expenses.
- Approval for any travel over $5,000.00.
- Approval for travel incurring accommodation expenses.
- Deciding on negotiated amounts for travel and accommodation.

General Manager

- Approval for travel expenses of staff on a lower classified level.
- Approval for accommodation expenses of staff on a lower classified level.
- Approval for advance payments.
- Approval for reimbursements according to evidence of expense provided.

Finance Officer

- Check supporting documentary evidence and advise the General Manager of any discrepancies.
- Process claims.

RELATED DOCUMENTATION

Accounting software records.

Staff timesheets and receipts/tax invoices.

REFERENCES

Social, Community, Home Care and Disability Services Industry Award 2010.
Associations Incorporation Act 1981.
The Constitution of Real Living Options Association Inc.
Income Tax Assessment Act 1997.

AMENDMENTS/REVIEWS

Amended 25/03/2010.
Amended 07/06/2012.
Amended 05/11/2015.
Amended 30/04/2020.
Amended 07/09/2023.
Amended 14/05/2026.