

# Reimbursement Guidelines

## To volunteer speakers for TexasBarCLE:

If you are speaking at a seminar, we will automatically register you for the course. Your registration and course materials will be complimentary. While we would like to cover all your expenses, we also try to delay for as long as possible increases in bar dues and CLE prices. To that end, reimbursement is limited to actual, reasonable expenditures necessary to plan or participate in our programs. Our ledgers are scrutinized by state auditors and the press, so please help us keep costs reasonable. If you anticipate a large or unusual expense, call us in advance. We may know of a less costly way to meet the need.

Please note the guidelines below **before you incur expenses**. Always submit this form—with receipts attached—within 30 days of the event for which expenses were incurred.

### QUESTIONS?

CALL TOLL-FREE  
TO PATTI, OUR  
REIMBURSEMENT  
COORDINATOR:  
800-204-2222,  
X1796.

### Transportation

- Whenever possible, we ask that you book the least expensive fare. You can do this by booking air travel 21 days in advance, especially for out-of-state travel; one last-minute ticket may cost as much as two advance-booked nonrefundable tickets! We cannot reimburse for first-class airfare. If possible, avoid any unnecessary charges.
- Use of a personal car is reimbursed at 51¢ per mile. For ground transportation, taxis are often less expensive than renting a car—plus, you don't have to worry about finding your destination. If a rental car is more appropriate, please use the State Bar of Texas Enterprise Account. Visit [enterprise.com](http://enterprise.com), roll over the *Business Rentals* tab, then click on *Make a Reservation*. In the first text box, enter *TXSOT* and in the PIN box enter *STA* to get a \$34.50/day rental (car class: Standard).

### Lodging

- We reimburse one night's lodging for each day you appear on a program. However, if circumstances make it necessary to stay longer, seek prior approval from the State Bar attorney or coordinator assigned to the course.
- If there is a host hotel, we reimburse for the negotiated room rate. (This rate is stated in our letter to you and in the course brochure.) If possible, please book a room by the published deadline, usually four weeks before the event. Off-the-street rates may be twice as high!
- We do not reimburse lodging for speakers residing in or practicing law in the county in which the course is presented, or in a county contiguous to that county.

### Meals

- Meal reimbursement can be up to \$40 per day. Only actual, reasonable expenses will be covered. Bar drinks or entertainment will not be reimbursed.
- When you purchase a meal with a credit card, you typically receive:
  - one receipt showing each item purchased and
  - a second "signature" receipt for the total with a blank for a tip.**Please turn in both receipts** with your reimbursement request.

### Other Costs

- We reimburse for actual, reasonable, out-of-pocket costs incurred while traveling for your presentation, including tips and parking. However, reimbursement for handouts brought or sent by you to a course requires **prior approval** from the State Bar attorney or coordinator for the course. Otherwise, you'll be reimbursed only up to the rates for such services as charged by our course book printer.
- If you need to incur other out-of-pocket expense in preparation for your presentation, please get **prior approval** from the State Bar attorney or coordinator assigned to the course. They may know of a less expensive way to achieve the result.
- **If you bring your spouse, co-author(s), assistants, or other guests with you**, the expenses associated with those persons will be your responsibility.

Within 30 days of the event,  
attach receipts and return this form to:

**Reimbursement Coordinator**  
**TexasBarCLE**  
**P. O. Box 12487**  
**Austin, TX 78711-2487**

**PLEASE  
PRINT**

# Request for Reimbursement of Expenses

If you are seeking reimbursement for speaking on the same program at more than one location, please use a separate request form (or a photocopy) for each location. Thank you!

Name **(Please print)** \_\_\_\_\_ Bar Card No. \_\_\_\_\_ Date of Request \_\_\_\_\_

Make check payable to (if other than above): \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Address \_\_\_\_\_ City / State / Zip \_\_\_\_\_

Date(s) of travel \_\_\_\_\_ Location of program / meeting \_\_\_\_\_

Name of program / meeting \_\_\_\_\_

**Transportation**    *See Guidelines on other side*

Public Carrier (airline or other) \_\_\_\_\_ \$ \_\_\_\_\_

Use of personal automobile: \_\_\_\_\_ miles at the applicable rate per mile\* = \$ \_\_\_\_\_

\*51¢ for travel on or after 1/1/11; 50¢ for travel before 1/1/11

Taxi, airport bus, shuttle, etc.: \_\_\_\_\_ \$ \_\_\_\_\_

**Meals & Lodging**    **\$40 per day for meals<sup>†</sup>**    **1 night's stay for each day you appear on a program**

| Date                                                                                                  | Breakfast | Lunch | Dinner | Hotel | Daily Total                                   |
|-------------------------------------------------------------------------------------------------------|-----------|-------|--------|-------|-----------------------------------------------|
| _____                                                                                                 | _____     | _____ | _____  | _____ | _____                                         |
| _____                                                                                                 | _____     | _____ | _____  | _____ | _____                                         |
| _____                                                                                                 | _____     | _____ | _____  | _____ | _____                                         |
| <sup>†</sup> If you use a credit card for a meal, attach BOTH receipts; see Guidelines on other side. |           |       |        |       | <b>Total for Meals &amp; Lodging</b> \$ _____ |

**Other Expenses**    *See Guidelines on other side*

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**Total Reimbursement Requested**    \$ \_\_\_\_\_

**I incurred the expenses described above for the purpose stated.**

**I attached receipts except in cases where the receipt has been lost.**

**I certify that this request is correct to the best of my knowledge.**

\_\_\_\_\_

**Requestor's signature**

FOR USE BY STATE BAR STAFF ONLY

| Fund        | Course | Expense | Location | Date |          |
|-------------|--------|---------|----------|------|----------|
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| ---         | -      | -       | -        | -    | \$ _____ |
| Grand Total |        |         |          |      | \$ _____ |

Approved for payment by \_\_\_\_\_

Date approved for payment \_\_\_\_\_