

AARP Driver Safety Program Standard Activity Expense Statement Instructions

To assist with filling out the Standard Activity Expense Statement and to receive timely reimbursements, please use the guidelines listed below. Guidelines are described from the top left of the form going across to the right and down to the bottom right corner. Course related expenses with the exception of co-teaching and overnight costs must be shown on the Course Tuition & Expense Report form.

Personal Information: Affix a current personnel label on the three copies of the expense statement (white, yellow and pink copies) and write in your telephone number. If you do not have a current label, print your name, volunteer ID#, address, city, state, zip code, title and telephone number in the space provided.

Address Check Box: Check the appropriate box if this is a new mailing address or seasonal address and indicate effective dates.

Accounting Code: The pre-printed code tells the AARP Accounting Department that this is a volunteer expense report. Enter the last three digits of your state or regional sub-ledger code into the boxes provided. If you do not know your sub-ledger code, contact your immediate supervisor.

Expenses:

1. **Receipts:** the program requires that volunteers submit receipts for all expenditures regardless of amount. All receipts must be taped, single sided, to an 8.5 x 11 inch sheet of paper for scanning purposes. Do not staple. Receipts need to be legible. Do not overlap receipts on the paper. You may submit photocopies of the receipts providing they are legible. If you do not have a receipt, make a note and attach it to the form. An itemized restaurant receipt is required for meal charges.
2. **Date:** Enter the date of the activity or when the expense was incurred – use a separate line for each day of travel or activity.
3. **Explanation:** List activity, location and total number of miles driven.
4. **Mileage Cost:** If traveled by personal car, enter mileage cost. Multiply the number of miles driven by current reimbursement rate and enter the dollar amount in the column (when claiming mileage, expenses for gas is not allowable).
5. **Travel:** Enter cost for plane, train, auto (rental car and gas expenses), taxi or shuttle. Be sure to include parking and toll fees. For airfare costs, you must attach proof of payment.
6. **Meals:** Enter costs of meals, including tips. AARP meal spending guidelines are: \$12 breakfast, \$18 lunch and \$30-35 dinner (includes beverages, snacks, tax and tip). An itemized copy of the restaurant receipt is required for meal charges. If the meal was a group meal, you must list the first and last name of everyone present on the receipt or on an attached sheet.
7. **Lodging:** Enter costs of lodging, including tips. If meals are listed on your lodging bill, do not list them under the meals column. You must submit the original itemized lodging folio and the folio must show a zero balance.
8. **Other:** Includes costs of items such as business phone calls, copy charges, supplies and postage.
9. **Daily and Column Totals:** Write in the total of your daily expenses per line and per column.
10. **Object Code Totals:** Write in the grand total for each object code in this column. Object code descriptions are listed on the bottom right corner of the expense statement.
11. **Grand Total:** Write in the grand total of the expense statement in the shaded box at the bottom of the Object Code Totals column.

Certification: By signing this expense statement, you are certifying your expenses claimed are actual and appropriate for reimbursement. Your supervising Coordinator's signature is required on this expense statement, as approval of your expenses. Statements not signed will be returned.

Distribution: Retain the white copy for your files. The pink should be retained by your supervising Coordinator. The yellow copy with attached receipts must be forwarded by your supervising Coordinator to AARP Driver Safety Program at P.O. Box 93114, Long Beach, CA 90809-3114.