

# REIMBURSEMENT REQUEST FORM

CITY OF PHOENIX  
PERSONNEL DEPARTMENT/EMPLOYEE DEVELOPMENT  
135 NORTH SECOND AVENUE, 3RD FLOOR 602-262-7561

**REFER TO GUIDELINES AND INSTRUCTIONS ON  
THE REVERSE PRIOR TO COMPLETING FORM**

Job Share  
YES  NO

EMPLOYEE I.D.	EMPLOYEE NAME (LAST, FIRST)	JOB TITLE	DEPARTMENT/DIVISION	WORK PHONE
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## I. TUITION REIMBURSEMENT

- Attach Tuition receipt and grade report for reimbursement.
- Attach Book receipt and syllabus for book reimbursement
- Sign for

**Course 1** Course Code and # \_\_\_\_\_

Name of School: \_\_\_\_\_

Course Title: \_\_\_\_\_

Tuition \_\_\_\_\_ Credit Hours \_\_\_\_\_

Grade \_\_\_\_\_ Lab Fee \_\_\_\_\_

Book Title \_\_\_\_\_ Cost \_\_\_\_\_

Dates: From \_\_\_\_\_ To \_\_\_\_\_

Was this course taken to meet a degree requirement? Yes  No

**Course 2** Course Code and # \_\_\_\_\_

Name of School: \_\_\_\_\_

Course Title: \_\_\_\_\_

Tuition \_\_\_\_\_ Credit Hours \_\_\_\_\_

Grade \_\_\_\_\_ Lab Fee \_\_\_\_\_

Book Title \_\_\_\_\_ Cost \_\_\_\_\_

Dates: From \_\_\_\_\_ To \_\_\_\_\_

Was this course taken to meet a degree requirement? Yes  No

Employee Signature

X \_\_\_\_\_

## II. SEMINAR

### STEP 1

Reimbursement  or Direct Pay   
(Receipts REQUIRED) (\$100 or more) Allow  
30 days for processing

### STEP 2

Seminar Title  
\_\_\_\_\_  
Seminar Company  
\_\_\_\_\_

### STEP 3

Start Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
End Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Registration Amount \_\_\_\_\_  
Airfare Amount \_\_\_\_\_  
Mileage Amount \_\_\_\_\_  
Ground Transportation Amount \_\_\_\_\_  
Lodging Amount \_\_\_\_\_

### STEP 4

Attach 2 copies of an invoice or a completed registration form, which must include Seminar costs, mailing and payee information for Direct Pay.

### STEP 5

Make all necessary pre-registration arrangements for Direct Pay.

Employee Signature  
X \_\_\_\_\_  
Department Head Signature  
X \_\_\_\_\_ Date: \_\_\_\_\_

## III. MEMBERSHIP

### STEP 1

Reimbursement  or Direct Pay   
Date paid: \_\_\_\_\_ (\$100 or more) Allow  
(Receipts REQUIRED) 30 days for processing

### STEP 2

Organization Name  
\_\_\_\_\_

### STEP 3

Start Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
End Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Membership Amount \_\_\_\_\_

### STEP 4

Attach 2 copies of an invoice or a completed registration form, which must include membership costs, mailing and payee information for Direct Pay.

Employee Signature  
X \_\_\_\_\_  
Department Head Signature  
X \_\_\_\_\_ Date: \_\_\_\_\_

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**FOR OFFICE USE ONLY**

Claim No: \_\_\_\_\_ Amount: \_\_\_\_\_  
Claim No: \_\_\_\_\_ Amount: \_\_\_\_\_

## INSTRUCTIONS AND GUIDELINES FOR REIMBURSEMENT REQUEST FORM

See the Employee Training and Development Training Catalog or A.R. 2.51 for additional information regarding the Reimbursement Program criteria. Use this form to request reimbursement for tuition, seminars, and memberships and direct pay for a seminar or membership totaling \$100 or more.

Complete the top of the form. Sign your name at the bottom of each section completed. By signing the form you are affirming that all the information you have given is complete and correct and you have complied with all applicable rules and regulations including those listed below.

**I. TUITION REIMBURSEMENT** Complete this section if you are requesting reimbursement for a course completed at a fully accredited college or university. School accreditation must have been awarded from one of the six accrediting associations of schools and colleges: Northwest Assn., Middle States Assn., North Central Assn., Southern Assn., Western Assn., or New England Assn. To complete this section enter:

- The school course code and number such as "ACC101".
- The name of the institution.
- The course title, for example "Intro to Accounting".
- The total tuition paid (registration, lab, non-resident and other fees excluded).
- The total credit hours received and your final grade. A grade of "C" or better is required for undergraduate courses, or a "B" or better for graduate courses.
- The lab fee for this course.
- The title and cost of the required textbooks.

**NOTE: Maximum reimbursement for lab fees and textbooks combined is \$175.**

- The beginning and ending dates of the course. (Reimbursements are paid from the fiscal year in which the class concludes). All courses must be taken on non-city time.
- Sign the form, **attach a copy of your official grade report, attach a copy of your tuition receipt, attach the text book receipt and the course syllabus, showing the required textbooks**, and submit to Employee Development. If you took more than one course, complete the same information for course 2. Do not request reimbursement for courses you are receiving grant awards or other paid financial assistance.

**II. SEMINAR** Complete this section if you are requesting reimbursement or direct pay for a job-related seminar or airfare, reimbursable mileage and/or lodging expenses related to a seminar. Reimbursements are not eligible for payment until the conclusion of the seminar. All seminars must contain an **educational component**. **Allow a minimum of 30 days processing time for direct pay requests.**

To complete this section enter:

- An X after Reimbursement for expenses you have already paid or an X after Direct Pay for seminar expenses totaling \$100 or more.
- The seminar title, seminar company name and mailing address (city, state and zip).
- The beginning and end date of the seminar. Seminar expenses are paid from the fiscal year in which the seminar concludes.
- The registration fee.
- The airfare amount or mileage and amount. **Mileage is a reimbursable item only** for seminar locations 100 miles or more from Phoenix. Mileage is calculated from Phoenix to the seminar location for seminar locations 100 miles or more and payable for not more than the cost of a 14-day advance notice airfare.
- Ground transportation is limited to airport shuttle fee and taxi fees from hotel location to seminar and return. Car rental is excluded without pre-approval from Employee Development.
- The lodging amount (cost of room plus room tax only) Lodging is a reimbursable item only.
- Have your department head approve, sign, and date this request. Attach your registration material, including a description of the seminar, and **all receipts necessary to document payment**. For direct pay include 2 copies of an invoice or a completed registration form showing seminar cost, mailing address, and payee information. **Make all necessary pre-registration arrangements.** Sign the form and submit to Employee Development.

**III. MEMBERSHIP** Complete this section if you are requesting reimbursement for a job related membership.

To complete this section enter:

- An X after Reimbursement for expenses you have already paid or and X after Direct Pay for a membership totaling \$100 or more.
- The organization name.
- The amount of the membership.
- The date you paid the membership if requesting reimbursement. If you have more than one membership, complete the "Request 2" section. Memberships are reimbursed from the fiscal year in which they are paid.
- Please have your department head approve, sign, and date this request. Attach your registration materials, including a description and fee schedule of the membership, and **all receipts necessary to document payment for reimbursement**. For direct pay include 2 copies of an invoice or a completed registration form showing membership cost, mailing address, and payee information.
- Sign the form and submit to Employee Development. **Allow a minimum of 30 days processing time for direct pay requests.**