

How to Complete an Expense Claim Form

1. **Make sure you have all original receipts.** Unfortunately, if you lose a receipt, you cannot claim the expense, as we need the receipts as proof of purchase for our records. Organize receipts so all the receipts for each individual are together (i.e. all of AB's receipts, then all of BC's receipts, etc). If you have expenses for multiple people, it's good to get in the habit of writing the initials on the receipts right away so you don't forget by the time it comes to submit them.
2. Print or download the Expense Claim Form from the Staff Resource Page:
www.buildingbridgescommunitysupport.org/wp-content/uploads/2021/03/Expense-Claim-Form.pdf
- * Blue numbers and letters in circles correspond to the numbers and letters in the photo and the sample table below.
3. At the top right corner of each receipt, write the individual's initials (AB), your initials (CD), and the corresponding row number (2):
4. Fill in the information from the receipts into the form. Keep the receipts of each individual grouped together in the table. See example below.
5. Add the totals of each column (5).
6. Add the totals of each individual in the table below (6).
7. Add the total of all your receipts on the bottom line (7).
8. Staple your receipts to the back of the expense form.
9. Drop them off in Astrid's mail box at the office.

ALLOWED EXPENSES

* PLEASE CHECK WITH EIRENE TO ENSURE YOUR INDIVIDUAL HAS A RECREATION BUDGET

- **PPE** related to the support you are doing = masks, gloves, cleaning products for your car, hand sanitizer, etc. **Maximum \$10/month.**
- **Entrance fees - your cost only.** It is expected that the individuals pay for themselves. You should get into most places for free with the Leisure Assistance and Access 2 passes. Check our website on how to apply for these passes if your person doesn't have one: (in the Useful Passes box)

www.buildingbridgescommunitysupport.org/public-resources/

- **Parking**
- Max \$10 at the **arcade** - make sure to get a receipt for the tokens
- \$20 max for **birthday treat**

NOT ALLOWED EXPENSES

- **Food** - If you go out for lunch with your individual, we recommend bringing your own lunch, or keeping your receipts for tax purposes. You can claim them as work expenses.
- **Gifts** - We generally discourage buying things for your people unless it's a special occasion and it's appropriate (it's never expected of you to do so). Buying things for people can lead them to expect it from other workers, which is unfair to future workers, and also to depend on others, instead of learning valuable budgeting skills.

SAMPLE EXPENSE FORM AND RECEIPT



Month: April, 2022 (please add the year)

Employee: Candy Delicious

			(3)	(4)	(3) – (4)	(AB)	
	Date	(1) Vendor	Total with GST	GST	Total minus GST	Individual's initials	
(2) ➡	1	April 4	Parking	\$2.00	0	\$2.00	AB
	2	April 10	Fresh Co	\$15.71	\$0.40	\$15.31 (\$15.71-\$0.40)	AB
	3	April 2	Silvercity Cineplex	\$15.00	\$0.35	\$14.65	XY
	4	April 16	UVic Parking	\$6.00	0	\$6.00	XY
	5	April 13	Pharmasave	\$10.00	\$0.50	\$9.50	PPE
		TOTALS	(5) \$48.71	(7) \$1.25	\$47.46		

Expense Totals: (original receipts must be included and numbered)

Individual	(6) Total receipts for each
AB	\$17.71 (\$2 + \$15.71)
XY	\$21.00
PPE	\$10.00

Total Expenses: (7) \$48.71

Director's approval: _____