

STATEMENT OF EXPENSE FOR MONTANA LEGISLATORS

Only spaces completed will be reimbursed. To receive reimbursement on the next paycheck this form must be submitted by 10:00 am 14-days prior to the next payday (refer to the State of Montana payroll calendar).

Meeting Description: _____

Meeting Date(s): _____

Meeting Location: _____

SALARY:

Enter number of days of **SALARY** claimed*: _____

*if applicable:

EXPENSES:

MEALS (number of meals claimed)

Breakfast _____

Lunch _____

Dinner _____

LODGING (number of nights claimed)

Most locations - \$107.00/day plus applicable taxes _____

Helena - \$122.00/day plus applicable taxes

(Itemized Receipt Required - CC or Bank Statements not accepted)

\$12.00/day non-receiptable facility _____

This is considered taxable income

MILEAGE

Enter total number of round-trip miles _____

If unknown, indicate "On File," and the correct # of miles to Helena will be calculated as stated at time of hire

AIR TRANSPORTATION

Commercial _____

(Itemized Receipt Required - CC or Bank Statements not accepted)

Personal Plane = 2 x's auto rate per actual nautical mile _____

MISCELLANEOUS (Registrations/Taxi)

(Receipt required if \$25 or more) _____

(Itemized Receipt Required - CC or Bank Statements not accepted)

I CERTIFY THAT I AM ENTITLED TO REIMBURSEMENT FOR THE EXPENSES CLAIMED ON THIS FORM.

Senator _____

Representative _____

Public Member _____

Mark **X** for reimbursement from Constituent Services:

Primary _____

Secondary _____

Printed Name _____

Approved by LSD Staff _____

Signature (use ink if submitting hard copy) _____

Date Approved _____

Address _____

TIMELY SUBMISSION OF CLAIMS: Under state travel policy, you must submit a request for reimbursement of travel costs within 3-months of incurring the expense or you waive the right to reimbursement.

"5-2-302, MCA. Compensation and expenses when legislature not in session. When the legislature is not in session, a member of the legislature, while engaged in legislative business with prior authorization of the appropriate funding authority, is entitled to:

- (1) a mileage allowance as provided in 2-18-503, MCA;
- (2) expenses as provided in 2-18-501, MCA, and 2-18-502, MCA; and
- (3) a salary equal to one full day's pay at the rate described in 5-2-301(1), MCA, for each 24-hour period (from midnight to midnight), or portion of a 24-hour period, spent on authorized interim or administrative committee legislative business or as otherwise provided by law. However, if time spent for business other than authorized legislative interim or administrative committee business or business related to 5-11-305, MCA, results in lengthening a legislator's stay away from home into an additional 24-hour period, the legislator may not be compensated for the additional day."

Summary of Statutes Governing Travel Reimbursement:

2-18-501, MCA

- Governs meals, lodging and transportation costs
- Establishes limits and authorizes reimbursement subject to proper documentation

2-18-502, MCA

- Governs computation of meal allowance
- Members are required to be in a travel status to claim meals

2-18-503, MCA

- Governs the mileage allowance.
- Rate is based on the current mileage allotment, as allowed by the IRS, for the first 1,000 miles and 3 cents per mile less for all miles thereafter traveled within a given calendar month
- Members who use their own airplanes in the performance of official duties are entitled to collect mileage only for the nautical air miles traveled, at a rate of twice the mileage allotment for automobile travel.

The statutes discussed above authorize the Department of Administration to adopt rules governing travel expenses. Travel policy is found: <https://doa.mt.gov/employee-travel>

Travel authorizations and claims may be reviewed by appropriate legislative leaders and committee chairmen.

Guidelines for Evaluating Reasonableness of Claims Adopted by the Legislative Council

The following guidelines are used to determine if time spent away from home reasonably falls within the context of authorized legislative business:

1. Overnight lodging is reasonable when the member is required to leave home earlier than 6:30 a.m. or arrive home later than 6:30 p.m. to have attended the entire meeting or have conducted all of the authorized legislative business. To compute whether this would be required, an average travel speed (overall, including incidental stops) of 50 miles an hour is used. The one-half hour immediately preceding and immediately following a meeting or activity is an in-town travel shift and considered to be part of the total meeting schedule for the purposes of the reasonableness computation.
2. A legislator is entitled to a day's salary when necessarily away from home for authorized legislative business (5-2-302, MCA) or as otherwise provided by law. A member is considered necessarily away from home on the day of a meeting or other authorized legislative activity and on any other day when a member stays overnight pursuant to #1 above.
3. Subject to statute, a meal falling within reasonable travel times may be claimed.
4. Special circumstances are considered in determining reasonableness. Such circumstances may include inclement weather, a legislator's health, variables related to flying instead of driving, and schedule conflicts which require a member to choose a more expensive mode of travel to participate in the legislative activity. Special circumstances should be clearly requested, presented, documented, and approved by the appropriate on the claim form.