

**STANDARDS TO BE MET**

1. Claims must be made on the “Expenses Claim” form.
2. Whenever possible expenses should be agreed in advance with your immediate supervisor / line manager.
3. For a group event the person in the most senior position in attendance should make the payment and submit a claim.
4. Only reasonable business related expenditure may be claimed. No alcohol may be claimed. For more detail on allowable expenses refer to the policy and protocols 2.3.3: Staff Travel and Accommodation.
5. All claims, excluding mileage, must be accompanied by the original itemised GST receipt (NB: copies of EFTPOS receipts, bank statements or credit card statements do not meet this criteria).
6. Claim must include the appropriate account code.
7. Claim must be signed by the claimant.
8. Claims forms must be approved by cost centre manager.
9. All claims for conference and course attendance must be approved by a line manager. Course attendance must be approved in advance.
10. Managers should not approve any expense claim if there is a possibility of a conflict of interest in relation to the claim (they should escalate the claim to their manager).
11. The Chief Executive Officer’s (CEO) expense claims will be approved by the Board Chairperson.
12. Supervisors / managers must ensure prior to approving, that the claim complies with BOPDHB policy and protocols regarding expenses.
13. Completed forms should be forwarded to Payroll for processing.

**ASSOCIATED DOCUMENTS**

- Bay of Plenty District Health Board policy 2.3.6 Reimbursement of Expenses as a Direct Result of DHB Business
- Bay of Plenty District Health Board policy 2.3.6 protocol 2 Expense Claims – Board / Committee Members
- Bay of Plenty District Health Board policy 3.1.1 Delegations
- Bay of Plenty District Health Board policy 2.3.3 Staff Travel and Accommodation
- Bay of Plenty District Health Board Form FM.E9.1 Expense Claim

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