



**American Postal Workers Union, AFL-CIO**

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1300 L Street, NW, Washington, DC 20005

**Travel and Expense  
Reimbursement Policy  
for  
Designated  
Representatives  
and Committee Members**

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## **Article I. Introduction**

It is the responsibility of each designated representative (advocate) and committee member representing the American Postal Workers Union, AFL-CIO (APWU) to know and to comply with the APWU Travel and Expense Reimbursement Policy for Designated Representatives and Committee Members.

This expense reimbursement policy is an Internal Revenue Service (IRS) defined “accountable plan” implemented to reimburse APWU designees and committee members for the entire amount of their actual business expenses within the limits defined below. This system relieves APWU designees and committee members of the burden of reporting income and justifying their travel expenses on their personal income tax returns.

Reimbursement of expenses also falls under the jurisdiction of the Department of Labor (DOL). To comply with both the DOL and the IRS rules and regulations, the APWU Expense Reimbursement Policy requires detailed receipts and complete documentation (who, what, when, where, and why) be submitted for all reimbursable expenses.

Reimbursement of expenses will be paid only upon completion of travel. A separate expense voucher must be submitted for each assignment. Expense vouchers should be submitted within thirty (30) days of the expense being incurred.

Upon completion of the Expense Voucher, the summary sheet, voucher, mileage log and receipts should be printed, signed where appropriate, scanned into a PDF format and emailed to [advocateexpenses@apwu.org](mailto:advocateexpenses@apwu.org). You will maintain all your original documentation including receipts and make them available upon request, if deemed necessary.

APWU assumes no obligation to reimburse advocates and committee members for expenses that are not in compliance with these policies. The Accounting Department will audit expenses to ensure proper original documentation and approvals are attached.

Expenses that are not specifically covered by this policy require the individual to contact the Authorizing Officer before incurring the expense to ensure proper approval and reporting requirements are met.

The Accounting Department will follow up directly with the advocate and committee members if there are any issues regarding approvals and documentation and/or if there are any audit exceptions greater than \$50. APWU requests contact information on your expense voucher for this purpose.

APWU reserves the right to require an advocate or committee member to reimburse the Union immediately for errors in LWOP and expense reimbursement. The Accounting Department will promptly correct any mistakes in the advocate and committee member's favor.

Please note that while some expenses may be reimbursable, under IRS/LM2 regulations, the reimbursement may be construed as "taxable income" to the advocate or committee member. The advocate or committee member will be liable for these taxes.

### ***Section 1.01 Expense Filing and Approval***

It is the policy of the American Postal Workers Union that all assignments and trips must be authorized in advance. Reimbursement of travel expenses will be paid only for approved assignments and trips.

If this is the first time you will be reimbursed by the American Postal Workers Union, please complete the attached W-4 and I-9 forms (required for all advocates and committee members). Forward these forms with your first expense voucher. You must provide your date of birth to receive a reimbursement check.

### ***Section 1.02 Arbitration Advocates Payment Policy***

Refer to President Mark Dimondstein's letter dated January 2, 2014 (attached).

Arbitration advocates will be limited to cases within 100 miles (or 200 miles round trip) of their home office or within state(s) boundaries except under unusual circumstances that will be approved through the offices of the Coordinator and the President. Advocates will not arbitrate contract cases across craft lines except as approved by the Division Directors.

All arbitration cancellations requiring the union to pay full or partial fees will be noted when submitting expenses with an explanation of circumstances requiring cancellation. Failure to provide an explanation may result in a delay of reimbursement. The National Union will not compensate local advocates for cancellations under Mod 15 or any other locally controlled program.

Advocates must send the original expense voucher to the Regional Coordinator and not APWU Headquarters. Keep a copy for your records. The Coordinator will review the expenses for all advocates in his/her region and will disallow any item that was not approved in advance. Advocates are required to submit documentation for arbitration assignment (e.g. status sheets for budgetary purposes.)

### ***Section 1.03 Committee Members and Members on Special Assignment***

Committee assignments are authorized at National Headquarters. Each committee member is notified by the authorizing office in advance of his/her assignment. Please attach a copy of the authorizing letter with your expense voucher.

Committee Members must submit all expense vouchers directly to the Accounting Department to ([advocateexpenses@apwu.org](mailto:advocateexpenses@apwu.org)) at National Headquarters. Keep a copy for your records.

## **Article II. Travel Arrangements**

Designated Representatives and Committee Members will be reimbursed for approved transportation expenses incurred as a result of an assignment. Taking time into consideration, the most economical and reasonable form of transportation is to be utilized.

**Note:** All Designated Representatives and Committee Members, are required to use our Headquarters' Travel Assistant for their travel needs.

The travel must be approved by the President's office and sent to the Secretary-Treasurer's office to be entered into the Travel Authorization System (TAS) by the Travel Assistant. The Travel Authorization number will be provided to the individual traveling (or his/her designee) who will then make their travel arrangements

Travel including transportation, hotel accommodations and rental cars, that is secured and approved through the Headquarters Travel Desk, that is charged to APWU's account and/or the designated representative/committee member's personal card, will be reimbursed in full.

### ***Section 2.01 Airline Travel***

Flight insurance is not a business expense and will not be reimbursed.

Occasionally, assignments are postponed or canceled. If this should happen after having purchased a non-refundable airline ticket utilizing a personal credit card, notify the airline as soon as possible. Remember, airline tickets have a monetary value and may be used for possible credit or exchange towards the purchase of another ticket. *The specified period of time for use is determined by each airline and can vary from six (6) months to one (1) year.*

Additional ticket fares or change fees incurred for personal reasons while on approved travel will not be reimbursed unless authorized by the APWU National President. Even if personal travel is authorized, the change fee is owed by the designated representative/committee member. Changing fees for business reasons require receipt and explanation.

### ***Section 2.02 Personal Car Usage***

If mileage is reimbursable, you are allowed the current IRS mileage rate (rate subject to change), when traveling by personal vehicle. All advocates and committee members using a personal vehicle are to notify their automobile insurance company of the business use of the vehicle.

When requesting reimbursement of mileage, individuals must provide documentation identifying the departure and arrival location, including the complete address, as well as the dates of travel and the number of miles driven, as per DOL requirements. (The expense voucher has been modified and a mileage log created which must be completed, signed and attached to the voucher in order to be reimbursed for mileage.)

Mileage expenses submitted from your home to your first assignment location are considered non-reimbursable personal commuting expenses, no matter what the distance is between your home and your assignment. However, mileage is reimbursable when you travel from your primary assignment (e.g. the Post Office or Local Union Office) to your secondary assignment (e.g. an arbitration site).

When requesting reimbursement for electronic toll payments, submit a copy of your toll statement. Reimbursement will be made with confirmation of assignment dates. Tolls paid by other means require receipts for reimbursement.

### ***Section 2.03 Car Rental***

All car rental expenses must be authorized in advance and included on your Travel Authorization before reimbursement can be made. It is the policy of the APWU for Designated Representatives and Committee Members to secure compact or economy rental cars. Upgrades must be waived if there is an additional cost.

Cars must be rented in the name of APWU and then your name. The APWU's automobile insurance policy provides necessary coverage. Do not agree to pay any additional insurance fees for a rental car, as typically offered by the rental agency at its service desk. If you do accept the additional coverage, you will be expected to absorb the cost of such coverage.

The paid receipt from the car rental company is required to be submitted for reimbursement. Faxed copies of receipts will be accepted with a written explanation. Reimbursement will be paid only for the actual days of your assignment. Rentals picked up and dropped off at a different location which incurs a drop fee must be approved in advance by the Authorizing Officer.

It is standard procedure to return the rental car with a full tank of gasoline. Although car rental agencies provide an option for pre-payment of gasoline, you may not take the prepaid gas option. Submit receipts for gas replenishment with your Expense Voucher.

### ***Section 2.04 Car Accidents***

In the case of a car accident while on assignment, take the following actions immediately:

1. For all Accidents – Contact Human Resources at (202) 842-4200.
2. For all Accidents – Submit an Accident Reporting Kit to Human Resources as soon as possible, but no later than 24 hours after the accident occurred.



3. For Accidents Involving a “Personal Vehicle” - The “Driver” must call his/her personal automobile insurance carrier.
4. For Accidents Involving Rental Vehicles - The “Driver” must notify the rental company.

### ***Section 2.05 Ground Transportation For Business Purposes Only***

Additional transportation expenses, such as taxi charges and/or transportation to and from airports, will be reimbursed. However, these charges must be fully receipted. Receipts for taxis must include date, origin and destination, and will be reimbursed for business purposes only (e.g. Hotel to Airport, location of business meetings).

## **Article III. Lodging**

The cost of your hotel room and tax are reimbursable in full for assignments that are at least fifty (50) or more miles from your home, unless approved in advance by the APWU National Secretary-Treasurer.

In the event you are utilizing the hotel master account, obtain a copy of your hotel folio at check-out with a zero balance and attach the bill to your expense voucher. Hotel master accounts are for room and tax purposes only.

APWU will not reimburse for any pay TV services or movies.

## **Article IV. Phone calls**

Reasonable business telephone charges on your hotel bill are allowed and are not considered as part of your per diem. One personal call, per day, will be allowed on the hotel phone, unless provided with another means for placing phone calls, including calling cards, with the maximum time of fifteen minutes. The purchase of phone cards will be reimbursed with appropriate receipts.

## Article V. Meals

If you are required to travel out-of-town on assignment, you are allowed up to \$70.00 per day for meals and incidental expenses. Incidental expenses do not include personal items. Per Diem does not cover meal expenses incurred in the city of origin (hometown). Any assignment within a one-way local commuting distance of fifty (50) miles [or 100 miles round trip] is considered “in town” by both the IRS and the APWU. Meal expenses submitted on “in town” assignments are not considered business expenses and cannot be reimbursed.

**Note: Tips are part of your per diem.** Tips for meals should not exceed twenty (20%) percent of the pre-tax amount and must be listed on the meal receipt.

Your total per diem allowance is determined by the number of hotel nights plus one travel day. *For example, if an assignment requires an overnight stay in a hotel, you will be allowed one day’s per diem plus per diem for one travel day (ex: 1 night + 1 travel day = 2 days per diem at \$70.00 per day, or \$140.00).*

Only meals for which you have acceptable receipts will be reimbursed.

Meals for \$15.00 or more are to be purchased with a credit card. When applying for reimbursement both the credit card receipt and the accompanying itemized receipt for the meal must be submitted.

The itemized receipt is to provide the date, establishment name, location and food/drinks purchased. If the meal is charged to your hotel room then an itemized receipt should be attached to the hotel bill. If an itemized receipt cannot be obtained, then a written explanation detailing the reason why must be included with the voucher.

For meals of \$15.00 or more not charged to a credit card, an explanation must be provided detailing the reason for not using a credit card. An itemized cash receipt (as defined above) for a meal expense less than \$15.00 is acceptable.

Generic/blank meal receipts will not normally be accepted as documentation of a meal expense. In rare instances, a generic receipt may be the only receipt available. Should this happen, the name of the restaurant must be included along with either the address or telephone number of the establishment. An explanation must be included as to why a credit card could not be used or why an itemized receipt could not be obtained. The reimbursement of meal expenses supported by generic receipts is subject to review and approval by the APWU National Secretary-Treasurer.

Expenses submitted in excess of the maximum allowable per diem will be deducted automatically from your expense total. If there are mitigating circumstances that caused you to exceed the allowable total, indicate them on your expense voucher for the APWU National Secretary-Treasurer's consideration.

Under the Labor-Management Reporting and Disclosure Act of 1959, as amended (LMRDA), meals are allowed for the benefit of the assigned officers and not for personal benefit.

APWU will not reimburse receipts for alcoholic beverages that do not include accompanying meal service or for alcoholic beverages that are not in proportion to the meal service. Furthermore, alcoholic beverages purchased from retail stores are not reimbursable.

## **Article VI. Incidental Expenses**

### ***Section 6.01 Laundry***

Laundry charges are reimbursable with acceptable receipts only on assignments of five (5) or more continuous nights and are not considered part of your per diem total. For any trip less than five (5) nights, laundry charges will be deducted from your per diem, if submitted.

### **Section 6.02 Tips**

Reasonable tips for housekeepers, bell service, sky caps, cabs, etc. are reimbursable and are included in the allowable per diem total.

- a) Bellhop/Sky Cap – SUGGESTED TIP: \$5 per bag.
- b) Housekeeper – SUGGESTED TIP: \$4 per day in a moderate hotel, \$6 to \$8 per day in a deluxe hotel. (Tipping daily rather than when you check out ensures that the tip will go to the specific person who cleaned your room.)  
*Be aware that some hotels charge your room directly for housekeeping.*
- c) Valet – SUGGESTED TIP: \$5 per handoff.
- d) Room Service Waiter – SUGGESTED TIP: Twenty percent (20%) of the total charge before taxes. (Check the bill to see if gratuity has already been included, but do not confuse this tip with a delivery charge.)
- e) Transportation tips – such as United Transportation:  
**Gratuity is generally included on the bill. Additional tips will not be reimbursed.**

### **Section 6.03 Miscellaneous Fees**

Fees incurred for late credit card payments, return checks, etc. are not reimbursable expenses.

## **Article VII. Compensation**

### **Section 7.01 Hours (Salary) – For Non-Arbitration Assignments**

While on authorized National Union business, you will be paid for all hours worked, up to EIGHT HOURS (8) PER DAY, to a maximum of FIVE (5) DAYS IN A ROW (OR 40 hours). Furthermore, no more than five (5) consecutive days in a seven (7) day period will be paid.

You will be paid whether you are on LWOP or annual leave hours. However, night differential and/or Sunday premium will be paid only for actual LWOP hours taken for authorized union business and when a 3971 form is attached to

your voucher. Please be sure your LWOP hours are accurately reflected on your 3971.

APWU is obligated to withhold taxes from your salary. Without a completed W-4 form, taxes will be withheld at the “Single with No Exemptions” rate.

Additionally, it is your responsibility not to exceed the maximum number of LWOP hours allowed under USPS guidelines so as not to jeopardize your USPS fringe benefits. In the event that you should near this maximum, please notify your Regional Coordinator so that he/she may be able to make the necessary assignment adjustments.

### ***Section 7.02 Hours (Salary) – Fulltime Local/State Officers***

To be paid by the national union, a fulltime local or state officer on a national APWU assignment (field or headquarters) must submit a letter from their local or state secretary/treasurer that they are or were in a LWOP or annual leave status from their local or state position, while on such assignment. No fulltime local or state officer will be paid for work on behalf of the national union without submission of said letter or while on sick leave.

### ***Section 7.03 Reimbursement for Lost Annual and Sick Leave***

In order to be reimbursed for any USPS annual and sick leave you lose while on National assignments, you must have worked a minimum of EIGHTY (80) HOURS without pay working on behalf of the National and have provided approved 3971s attached to your expense voucher in order to be reimbursed for lost leave for the LWOP hours worked.

The maximum reimbursement by the national union will be \$25,000, including salary and all other reimbursements.