P.O. Box 7044 Rockford, IL 61125 Phone: 815-399-4300

Professional ExpenseReimbursement

NAME:	REIMBURSEMENT PE	REIMBURSEMENT PERIOD:					
PARISH/CC	HS/AGENCY:C	CITY:					
Comments:	omments: Please indicate the full date and a brief description of ministry purpose, and attach receipts. See example below.						
<u>Professional Expense Summary</u> : (attach receipt for each item)							
DATE	Description - Category	Amount	Receipt				
10/1/2016	Example: US Cleaners – dry cleaning	35.00	√				
	TOTAL Professional Ex	penses					
= @ current I	e total from separate mileage log(s) miles x s RS reimbursement rate (0.655 effective January 1, 2023) ofessional Expense Reimbursement Requeste	\$0.655	_				
	Limited to \$9,600 annually per fiscal year	•	_				
Signature:		Dato:					

Catholic Diocese of Rockford





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NAME:	REIMBURSEMENT PERIOD:	IMBURSEMENT PERIOD:	
PARISH/CCHS/AGENCY: CITY:			
	e indicate the full date and a brief description of ministry purpose. So to hospital, nursing home, travel for meetings or conferences.)	ee example belov	
DATE	DESCRIPTION OF TRAVEL INCLUDING PURPOSE & LOCATION	MILEAGE	
10/1/2016	Example: St. Anthony Hospital – sick calls	10	

Total mileage to be carried over to Professional Expense Reimbursement form:

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Table Expense Reimbursement

Grocery Store / Restaurant : Whole Foods - groceries	Amount	Receipt √
: Whole Foods - groceries		√
TOTAL Table Expense (Split into categories below)		
RECEIPTS MUST BE ATTACHED FOR ALL ITE	EMS.	
	\$	_
	(Split into categories below)	(Split into categories below)

^{*} Note: Personal meals at restaurants are reimbursable, but according to IRS rules, are taxable and will be added to W-2 wages.

Diocese of Rockford Professional and Table Expenses Definitions

PROFESSIONAL EXPENSES (G/L: xxx-40200)				
MILEAGE	The IRS sets a standard mileage reimbursement rate each year to reflect current automobile operating costs. The rate covers gas, insurance, cost of owning (car loan payments or lease payments) and repairs to a vehicle. Report the number of miles driven in a month on the professional expense report. Tolls or Parking are also reimbursable in addition to any mileage calculation. Report any tolls/parking and attach a receipt to the professional expense report. Do not attach receipts for gas, repairs, etc., unless it is a diocesan owned vehicle.			
LODGING	The eligible expenses for lodging while at a ministry-related meeting, retreat, conference. Eligible expenses require a receipt which includes date, location and purpose of the lodging.			
CLOTHING	The cost of vestments, black clerical suits, dry cleaning, etc.			
CELL PHONE	The cost of the regular cell phone service and usage is reimbursable. Please understand that excessive personal use may be denied reimbursement.			
DUES & SUBSCRIPTIONS	Professional dues to organizations, subscriptions to magazines, etc.			
SUPPLIES	This category includes ministry supplies, computer supplies, books, etc.			
MINISTRY-RELATED MEALS OUTSIDE OF RECTORY	Any meals outside of rectory that have a ministry purpose. Please annotate on the receipt the ministry purpose and who is in attendance. You can report any travel related meals also in this category. This expense is part of the professional expense limits for the year.			
TABLE EXPENSES (G/L: xxx-45200)				
MINISTRY-RELATED MEALS AT RECTORY	Meals or celebrations at the rectory for a group of people should be a parish expense directly and not be reported on the individual expense report.			
PERSONAL MEALS AT RECTORY	Per the IRS, this is an income tax-free benefit to priests. If a priest buys groceries for use at the rectory, he should submit the receipts for reimbursement. This is a separate reimbursement from professional expenses and does not count toward the \$9,600 annual limit for professional expense reimbursements.			
PERSONAL MEALS (EATING ALONE OR WITH FRIENDS) NOT AT RECTORY	The IRS views this as a perk or benefit which is taxable. Any personal meals that are reimbursed need to be reported to the diocese annually to be added to the priest's wages for tax reporting.			