Transport Professionals Association

Transport Professionals Association Reimbursement Policy

1 Purpose

This policy outlines the process for reimbursing approved expenses incurred during TPA branch events and committee meetings, ensuring consistency, transparency, and financial accountability.

2 Scope

Applies to all TPA members, branch leaders, committee members, staff, and authorised volunteers incurring expenses for approved TPA activities.

3 Eligible Expenses

3.1 Branch Events: Reimbursable expenses include venue hire, catering, supplies, event materials, and equipment hire.
3.2 Committee Meetings: Reimbursable expenses include catering, meeting materials, and venue hire if applicable. Travel expenses for committee meetings are not reimbursed.

4 Use of Branch Credit Cards

Each branch has 1–2 TPA-issued credit cards. If a cardholder is available, expenses must be charged to the branch card. If unavailable, an authorised representative may use a personal card and request reimbursement.

5 Required Documentation

A valid tax invoice is required for all claims. Clear photos of invoices are acceptable.

6 Reimbursement Process

- **Step 1:** Collect Documentation – Keep the tax invoice or photo of the invoice.
- **Step 2:** Request Form – Contact the TPA Accounts Team to obtain the Reimbursement Form.
- **Step 3:** Submit for Approval – Completed Reimbursement Form and invoices are submitted via ApprovalMax. Each branch has an assigned approver who must approve before processing.
- **Step 4:** Processing and Payment – TPA pay run occurs every Thursday. Only reimbursements approved in ApprovalMax before the pay run cut-off will be included in that week's payment run. Approved reimbursements are paid via direct deposit.

7 Ineligible Expenses

Personal purchases, alcohol unless pre-approved, late fees or interest charges, travel expenses for committee meetings, expenses lacking a valid tax invoice, and unauthorised spending.

8 Compliance

Failure to follow this policy may result in rejection of claims.

9 Key Contact

TPA Accounts Team
accounts@transportprofessionals.com.au
+61 7 3544 5670

Transport Professionals Association
TPA National Finance Office
accounts@transportprofessionals.com.au

TPA Expense Claim Form for Reimbursement

This form is to be completed when submitting an AITPM expense claim for reimbursement. It should be used to claim reimbursement for expenses incurred in accordance with TPA Policies and Procedures.

All claims for reimbursement must be supported by the relevant tax invoices or documentation. Once completed, this form will be submitted via ApprovalMax by the Accounts Team for approval by the relevant authoriser before reimbursement can be processed.

- *Email the completed form to accounts@transportprofessionals.com.au with subject line: "TPA Expense Claim Form for Reimbursement"*
- *Submit your tax invoice(s) to the following email addresses for processing:*
  - *aitpm-bills@mail.approvalmax.com*
  - *accounts@transportprofessionals.com.au*

Refer to Page 1 and 2 of this form for further TPA Reimbursement Information and Policy.

Name in Full				**TPA Branch**	
Email address				**Mobile No**	
Bank Account Name		**BSB**		**Account No**	
Transaction(s) Purpose				**TPA Event** ***(if applicable)***	

Date of transaction(s)	**Supplier**	**Description of Goods**	Purchase Method *eg/ Cash, Credit card...*	GL Code ***(if known)***	**Amount**

CLAIMANT DECLARATION:
I, the undersigned, solemnly and sincerely declare that the expenditure to be reimbursed, as detailed above:
- was for legitimate TPA business & does not include any private expenses; &
- that I have not, and will not, use this tax invoice(s) to claim reimbursement from any other source or to support any future duplicate claim.

Signature of Claimant		**Date**	
Print Name of Claimant			

Authorisation & Declaration (TPA Branch President or CEO) – through ApprovalMax

By authorising this form, I confirm that the expense(s) are appropriate from a budgetary perspective, compliant with TPA Policies and Procedures, and constitute bona fide TPA expenditure.

This form will be submitted via ApprovalMax by the TPA Accounts Team for approval by the relevant authoriser for claimant reimbursement.

TPA Reimbursement Information

Pre-Approval:

For any reimbursement, it is important to obtain verbal or written pre-approval from the authorised person (e.g., CEO, Branch Presidents/TMN Chair, or Branch Treasurer/TMN Treasurer). This ensures that when the expense claim is submitted, the appropriate authoriser is already informed and can approve the claim promptly.

Reimbursements:

- **TPA Approved Travel Costs:**
  Incidental travel costs, such as taxis/Ubers, airport parking, and incidental meals, can be reimbursed for TPA-related travel.
- **State Branch Event Costs:**
  Costs incurred by State Branch Committee members when organising branch events are eligible for reimbursement.

Reimbursements can only be processed with a valid tax invoice

Receipts or credit card slips are not acceptable. It is essential to acquire and retain the tax invoice for all eligible expenses.

Submission of Tax Invoices:

- Submit your tax invoice(s) to the following email addresses for processing:
  aitpm-bills@mail.approvalmax.com
  accounts@transportprofessionals.com.au

Missing Tax Invoices:

If a tax invoice for goods/services has been misplaced or cannot be obtained, please request a "Missing Tax Invoices Declaration" form from the Accounts Team at accounts@aitpm.com.au

Important Information for Reimbursement Claims:

PLEASE NOTE: tax invoices must meet the requirements outlined below

Tax Invoice Requirements

Tax invoices must contain sufficient information to verify the following:

- The document is clearly marked as a tax invoice.
- The seller's identity.
- The seller's Australian Business Number (ABN).
- The date the invoice was issued.
- A brief description of the items sold, including quantity (if applicable) and price.
- The GST amount (if applicable), shown separately or indicated as "Total price includes GST" if the GST is exactly one-eleventh of the total price.
- Whether each sale on the invoice is a taxable sale.

Invoice Address:

Please ensure where practical invoices are addressed to:

Transport Professionals Association
PO Box 107
Lutwyche QLD 4030

For any queries, please contact TPA Accounts team:
Email: accounts@transportprofessionals.com.au
Phone: 07 3544 5670