

Clergy Travel Claim Spreadsheet

The accompanying spreadsheet is designed to make it easy for clergy to claim their travel expenses. The rules are straightforward: clergy may (and should!) claim travel expenses at a fixed rate per kilometre travelled on parish business, as well as reimbursement of related expenses (such as parking). There are, in fact, two different rates paid per kilometre, one which is paid for parish business for the first 5000 km during the calendar year, and a second which is paid for travel over 5000 km in the year. The second rate is paid for any travel on diocesan business. For more detail, please see the travel policy.

The travel spreadsheet is designed to make it easy to submit a travel log, which is required for any reimbursement. It is designed to allow for a monthly claim to be submitted to the parish treasurer, and a quarterly claim to be submitted to the diocesan treasurer. The spreadsheet consists of 17 sheets, beginning with a Summary sheet. You can see the other sheets by clicking on the tabs at the bottom of the spreadsheet, marked Summary, Jan, Feb, etc, and Q1, Q2, Q3, Q4. On all sheets, headings and formulas are protected, so you can only type in the cells that you will need to change.

You can type your name on the Summary sheet where it says "My Name". Your name will then appear on all the other sheets. Nothing else on the Summary sheet can be changed, as all figures on that sheet are automatically generated. This sheet may be useful to be printed at year end for your records. It will also be useful for budgeting travel for subsequent years in the parish.

For each of the monthly sheets (Jan, Feb, ...) there are an initial ten lines for making claims for each trip taken on parish business through the month. Each line allows you to enter the date of the trip, the distance in kilometres, any amount of Other expenses, and a space to enter the purpose of the trip. A sample line might read:

2013 01 15 16 \$0.00 Monthly Nursing Home service

Where the purpose of the trip is a pastoral visit in home or hospital, the purpose can read "Home Visit" or "Hospital Visit" in order to preserve confidentiality.

There is no required format for the date. Use whatever format you like, as long as it's consistent.

If you run out of lines in a month, you can add more by placing your cursor on the blank line above the totals, then clicking on Insert, and choosing "Insert Sheet Rows."

The amount of your claim is automatically calculated using the correct rate for distance (differentiating between the first 5000 km and subsequent travel) and adding "Other" amounts. The total distance, Other charges and claim are also automatically entered in the Summary sheet.

Diocesan claims (sheets Q1, Q2, etc) work like the monthly parish claims, except these sheets are intended to be submitted quarterly rather than monthly.