



# SARTARTIA MIDDLE SCHOOL PTO

8125 Homeward Way | Sugar Land | TX | 77479

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## SMS PTO REIMBURSEMENT POLICY

**IMPORTANT:** If you or any member of your committee purchases goods on behalf of the PTO or its committees, the following guidelines **MUST** be followed to insure full and timely reimbursement.

1. You must complete a **Check Request Form**. Include a detailed description of what was purchased and for what purpose. **Reimbursements must be approved by the committee chairperson and noted on the form in the “Approved by” box.** If the PTO committee chairperson is making the purchase then you must get approval from PTO president or principal. These Check Request Forms are available at the PTO table in the main office.
2. Only items accompanied by receipts and/or invoices will be reimbursed. **You must attach a legible receipt and/or invoice** for each reimbursable item and staple the receipt/invoice to the reimbursement form. Please make sure all receipts are dated and easy to read.
3. Receipts **must not have personal items co-mingled with PTO items.** Please get a separate and distinct receipt for all SMS PTO purchases. We **will not** accept receipts that include personal items.
4. You **must use the Texas Sales Tax Exemption Certificate.** Complete the form accurately and provide to the supplier at the time of purchase. If for some reason the supplier will not accept the form and waive the taxes, you will have to use a different supplier. The **PTO will not** reimburse for taxes. Exemption Certificates are available at the PTO table in the main office.
5. If turning in more than one receipt, please add up all receipts, **check for accuracy**, and request the total dollar amount.
6. The SMS PTO will reimburse for gratuity for goods and services rendered up to a **maximum of 15% of the invoice (before a discount is taken) on delivery orders** and up to a **maximum of 10% of the invoice (before a discount is taken) on pick-up orders.** Any gratuity reimbursed for will come from that committee’s annual approved PTO budget.
7. Check requests must be submitted **within 30 days after an event has finished.**
8. **Turn in reimbursement requests and attached receipts/invoices to Teresa Chao, Treasurer.** Please put your paperwork in the treasurer’s PTO folder in the main office. The treasurer will pick up requests on Friday of each week. As long as there are no follow-up questions/concerns with the request, she will write a reimbursement check within 7 days and place it in the appropriate committee folder unless another delivery method was specifically requested on the Check Request Form.
9. Please contact Teresa Chao at 972-898-6679 or [teresaichao@yahoo.com](mailto:teresaichao@yahoo.com) with any questions.