

Introduction to Reimbursement and Expense Recovery Bonus Policy & Standard

The brand-new Reimbursement & Expense Recovery Bonus Policy and Standard applies to all expenses as of **January 1, 2023**.

What are Reimbursements and Expense Recovery Bonuses?

We are using important new language for the Policy, Standard, and Forms in 2023.

- Expenses that qualify under IRS guidance as non-taxable reimbursable business (ministry) expenses are referred to as **Reimbursements** on the new Standard and Form.
- An **Expense Recovery Bonus (ERB)**, formerly known as taxable reimbursement, is applied when the submission of expenses *does not* qualify for "reimbursement" under IRS guidance. These will take the form of a bonus, which will be treated as additional taxable wages (compensation). *Since only paid employees can receive a taxable bonus, associates are not eligible to submit a request for an Expense Recovery Bonus or any expense with a taxable (ERB) component.*

Highlights of Significant New Changes in 2023

- The **Ministry Expense Bonus** amounts have changed. Previously, the ME bonus was broken down into individual expense category maximum amounts. This will no longer be required. Reliant is now asking U.S. field workers to determine the appropriate total ME Bonus amount (up to a specific, designated monthly total) based on the amount needed for the individual. In addition to this change, we have separated monthly phone service expenses. This allows you to receive funds to cover the monthly phone expense as non-taxable. If your role at Reliant is eligible for this type of bonus, please review [Ministry Expense Bonuses](#) for more details on the ME bonus and monthly phone service changes before submitting a new support goal.
- **Computers, Equipment, Mobile Phones, and Some Furniture**- These items used to be 100% taxable. In the future, they will be 75 % reimbursable (non-taxable) and 25% ERB (taxable) with the requirement that you intend to continue working with Reliant (at 20 hours or more for the next 12 months). We have also increased the max limits to be greater and changed the number of years before you can purchase these items again. *Please review the Standard for specific details for each type.*
- **Local mileage** for necessary ministry-related trips is now 50 miles each way from the starting ministry location rather than 100 miles.
- Moving forward, **Spiritual & Ministry Planning Retreats** will require the submission of a [Personal Development Plan \(PDP\)](#). A PDP will be submitted and reviewed as a tab in the regular annual Job Description form and process.
- **Others** - you will find these and many other minor changes highlighted directly on the Standard Page.

Please don't hesitate to contact your Program Team Liaison (listed at the bottom of this page) if you need help navigating the new policy, standard, or form.

What Do I Need To Do?

1

Familiarize yourself with the [Reimbursement and Expense Recovery Bonus Standard](#). This page details all the important expense submission information you need, including yellow "Note" boxes throughout to highlight all changes. This single page holds all the details to make things more user-friendly and helpful for you.





2

Review the associated [Reimbursement and Expense Recovery Bonus Policy](#).

3

When you are ready to submit an expense submission, use our new [Expense Submission Forms](#). You will find tutorial videos with instructions for submitting these forms.

Questions?

U.S. Based Missionaries	Collegiate & GCC Missionaries	Interns/Residents	International Missionaries
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