

QUICK REFERENCE GUIDE

SMITHSONIAN MISCELLANEOUS REIMBURSEMENT (Formerly Known as Petty Cash)

Please use a purchase card whenever possible

What is a Smithsonian Miscellaneous Reimbursement (SMR)?

A SMR is a payment for a purchase that is often of an urgent or immediate nature and does not require delegated purchasing authority. Detailed instructions, procedures, and limitations on the reimbursement of small miscellaneous expenditures may be found in the Financial Management Payments Handbook, which is available on the Office of Comptroller (OC) PRISM website.

What is the dollar threshold for a SMR transaction?

SMRs should be for expenses below \$300 per total purchase.

What types of expenses are reimbursable as SMR transactions?

- Urgent, small local purchases of supplies or services that cannot be completed with a purchase order or government approved purchase card
- Emergency repair of equipment
- Postage
- Internet purchases when a purchase card is not available
- Business representation/donor cultivation activities, including meals. Only Trust funds may be used for such expenses; documentation must include names and titles of attendees and business purpose. (NOTE: meals and/or refreshment purchases must be made in accordance with SI's Gifts, Alcoholic Beverages, and Food (GAF) policy and OPMB's guidelines on the use of Trust funds for representational and special event expenses)
- Local travel expense claims (mileage, tolls, parking, taxis, etc.)

How are SI SMR claims filed?

SI claims for SMRs require a Form SI 3153 (available on the OC website with instructions). Along with the form, claimants must include documentation taped or stapled to a letter-size sheet of paper providing the following data:

- Original receipt, credit card slip, or bank stamped check
- Description of the item purchased
- Date purchased, receipt must be within 30 days (no exceptions)
- Vendor's name and address
- Amount paid
- Local Travel reimbursement claims must be accompanied with original supporting documentation (i.e., taxi receipts, parking receipts, etc.). Form SF 1164 is no longer accepted for local travel reimbursement

What signatures are required on all SMRs? (Complete signatures only - no initials)

- The claimant, the Certifying Fiscal Officer, and Approving Official are required to sign the form.
- If the Unit Director is the Claimant, the Under Secretary will be the Approving Official.
- If a direct report of the Secretary is the Claimant, the Secretary will be the Approving Official.

NOTE: The same signature must not appear twice on the form, and the approver must never be a subordinate of a claimant.

What is considered local travel?

Local travel is travel from the employee's duty station to a business destination in the local travel area during the workday when SI-provided transportation is not available. Local travel areas for all SI locations can be found in Appendix 4 of the SI Travel Handbook. Directors of units outside of the Washington, D.C. Metropolitan Area have determined their local travel areas. Local travel never includes transportation from an employee's residence to the duty station.