

### Instructions for Completing Supreme Form 267DD Electronically

Supreme has made Form 267DD (for submission of DD expenses) a pdf-fillable form, which can be submitted electronically without ever having to print out the forms or take pictures of the forms. However, in order to submit the form electronically, you do have to understand a few things about the way Adobe Acrobat Reader works. This document outlines a process for you to follow that should make it relatively easy for you to fill out and submit Form 267DD.

1. First, you must have Acrobat Reader DC on your computer. This is a free program, but be sure to get it from the official site: <u>https://get.adobe.com/reader/</u> Also, be sure to uncheck all of the optional offers, or you may get some unwanted software on your computer.

If you have a subscription to Adobe Acrobat DC Standard or Pro, you may use that instead, but don't mix and match—use one program exclusively for your form editing.

Next, download the basic form from Supreme and store it somewhere on your computer. The download link is here: <u>https://www.kofc.org/en/forms/state/DD\_Miles.pdf</u>.

Next, open up the form with Acrobat Reader DC, fill out the bottom part of the form with your information. (DO NOT ENTER AN ELECTRONIC SIGNATURE AT THIS TIME!) When you are finished, save it to a new file (for example, DD99\_Miles\_Template.pdf). This will serve as your own personal template, and you won't have to bother with entering your information again for subsequent reports.

					TOTALS	0.00	0.00	0.00	0.00	0.00		
						I hereby certify the foregoing to be a true and correct statement of expenses incurred by me.						
Approved by				$\int$	Signature							
		(State Deputy)			Name							
					4357 Main St							
				l	Street							
	(Da	ite)			Sunsh	nine		FL		33333		
					City			State/Prov.	Zip/P	ostal Code		
					9876543 99							
					Members	hip Number			District Nu	mber		
										$\sim$		

<b>Knights of Columbus</b> Expense Account of District Deputy or Conferring Officer											
Date	Trave	el To	Purpose/Council Number	Round Trip Mileage	Transportation at .30 per mile	*Room	*Meals	*Misc.	Tota		
				_							
				_							
				_							
				_							
				_							
				_							
				_							
				_							
				_							
				_							
				_							
				TOTALS	0.00	0.00	0.00	0.00			

Ap	proved	by

(State Deputy)

(Date)

atement of expenses incurred by me.

Signature		
John Doe		
Name		
4357 Main St		
Street		
Sunshine	FL	33333
City	State/Prov.	Zip/Postal Code
9876543	99	Э
Membership Number	Dis	strict Number

2. Ok, so you just finished the first trip for the Quarter. Open up your template (in this example, DD99\_Miles\_Template.pdf), and then save it to another file, such as DD99\_1st Qtr 2022.pdf. This file will be used for <u>all</u> of your normal travel-related expenses for the Quarter.

3. Now, fill in the trip information for this first trip.

a. Date of travel. This is a dropdown with a calendar to select the date.

b. From and To locations (use City, State—don't use "Home")

c. Purpose of the trip—this is normally to visit a Council business meeting, officers meeting, or function. Please be sure to read the form instructions page so that you know what travel is considered reimbursable by Supreme.

d. Round Trip Mileage. <u>Note that the form automatically calculates the dollar amount after you enter</u> the mileage.

e. If you have other permissible expenses associated with the travel, enter them in the appropriate column. Again, please read the instructions as to what is permissible. Tolls should be entered under the Misc column. Note that ALL expenses EXCEPT mileage require receipts, and that includes tolls. (Submission of receipts is covered below.) Spouse per diem, when authorized, also does not require receipts. The form automatically computes the Total column.

Once you have entered the information, save the file. (You may get a "Save As" dialog box—just save it to the same name and folder as the original file—in this example, it would be DD99\_1st Qtr 2022.pdf). Your form should look something like this:

Knights of Columbus Expense Account of District Deputy or Conferring Officer									
Date	From	Travel To	Purpose/Council Number	Round Trip Mileage	Transportation at .30 per mile	*Room	*Meals	*Misc.	Total
1/6/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50

4. For each succeeding trip, follow the process above to enter the trip information.

You may also wait until the end of the quarter and enter all information at the same time, but it is less daunting if you do the work after each trip. Be sure to save the receipts for each trip after you enter the form data.

5. Once you have completed entering all of the data for the quarter, you can electronically sign the form. If your form is already open, it would be an excellent idea to save your form before you begin the electronic signature process. **ONCE YOU HAVE ELECTRONICALLY SIGNED THE FORM, YOU WILL NOT BE ABLE TO MAKE ANY FURTHER CHANGES TO THE SIGNED FORM!** 

a. Open up your file with the quarter's travel entries and note the location of the Acrobat Sign tool.

DD_99_1st Qt	202							-	
	r 202 ×								
$\overline{\mathbb{Q}}$	$\bigcirc$		▶ 🖑 ⊖ ⊕ 1	25% 🔻	₽- ₩	Ţ	00	2 🕄	団 (
	× 7		nights of Co					J	
Date	From	Travel To	Purpose/Council Number	Round Trip Mileage	Transportation at .30 per mile	*Room	*Meals	*Misc.	Total
1/4/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50
1/6/0222	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60
1/10/2022	Sunshine, FL	Dawn, FL	Council 77777 Bus Mtg	25	7.50				7.50
1/12/2022	Sunshine, FL	Riverfront, FL	Council 55555 Bus Mtg	18	5.40				5.40
2/1/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50
2/3/2022	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60
2/9/2022	Sunshine, FL	Riverfront, FL	Council 55555 Bus Mtg	18	5.40				5.40
0/44/0000	Sunshine, FL	Dawn, FL	Council 77777 Bus Mtg	25	7.50				7.50
2/14/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50
3/1/2022		Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60
	Sunshine, FL			10	5.40				5.40
3/1/2022	Sunshine, FL Sunshine, FL	Riverfront, FL	Council 55555 Bus Mtg	18	5,40				5.40
	Sunshine, FL	Dawn, FL Sundown, FL	Council 77777 Bus Mtg Council 99999 Bus Mtg	25 48 12	7.50 14.40 3.60			2.10	

b. Click the Sign Tool. (You will probably get a message in a black box—just ignore it.) Then click "Add Signature". (If the "Add Signature does not appear, click "Sign yourself.) **NOTE:** If you already have a saved signature, you can use that—these instructions assume you do not already have a saved signature.

12 ×										?	. <b>.</b>	
		1	/ 2 ▶ ⊕ ⊖ ⊕	125%	· 🛱 ·	<b>₩</b>					0	
		•	放 Sign yourself 🛛 🔝 Requ	iest signa	tures					N	ext	
		<b>.</b>	Add Signature 🕒						rm has specifie field to start fill	d the fields which y ing form.	/ou	>
	7	K Expe	A shell to table to the		bus		ОК			_		
Date	From	To	Purpose/Council Number	Round Trip Mileage	Transportation at .30 per mile	*Room	*Meais	*Misc.	Total			
1/4/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50			
1/6/0222	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60			
1/10/2022	Sunshine, FL	Dawn, FL	Council 77777 Bus Mtg	25	7.50				7.50			
1/12/2022	Sunshine, FL	Riverfront, FL	Council 55555 Bus Mtg	18	5.40				5.40			
2/1/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50			
2/3/2022	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60			

c. After clicking "Add Signature", you will get the following screen:

	Type Draw Image	
2		
Sign	Type your name here.	
Save signature		
	Cancel Apply	

There are three ways to add a signature, as indicated by the symbols at the top:

(1) Type a signature. This is the most common option.

(2) Draw your own signature.

(3) Use an image file that has your signature.

For method (1), simple type your name. When you are done, you may choose the font style. Method (2) uses your input device (a mouse or an electronic pen) to draw your signature. For method (3), upload the image of your signature from a file on your computer when prompted.

	الله المعنى	
	1	
John i	DAO.	
		Change style 🗸
U		
Save signature		
	Cancel Apply	

Once you are finished, be sure the "Save signature" box is selected, then click "Apply".

d. You will be taken back to the form, and your mouse is now connected to the signature (moving your mouse will move the signature.)

	7		John nights of Co nse Account of District Deputy						
Date	From	Travel To	Purpose/Council Number	Round Trip Mileage	Transportation at .30 per mile	*Room	*Meals	*Misc.	Total
1/4/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50
1/6/0222	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60
1/10/2022	Sunshine, FL	Dawn, FL	Council 77777 Bus Mtg	25	7.50				7.50
1/12/2022	Sunshine, FL	Riverfront, FL	Council 55555 Bus Mtg	18	5.40				5.40
2/1/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.50
2/3/2022	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.60

e. Using the mouse, drag the signature to the signature line. Left-click the mouse once, and a box will appear around the signature. The menu within the box allows you to enlarge or shrink the signature, or delete it altogether.

			TOTALS	92.70	0.00	0.00	6.30	99.00
*Receipts are required for all items				ertify the f			e and corre	ect

Approved by

(State Deputy)

statement of expens	es incurred by me.
John Doe	
Signature	

John Doe	
Name	
4357 Main St	

Street Sunshine FI 33333

#### f. Click outside the box to finalize the signature.

					IUTALS	92.10	0.00	0.00	0.00	33.00
*	Receipts are re	quired for all ite	ms	I hereby certify the foregoing to be a true and a statement of expenses incurred by me.						t
				-	<b>John</b> øgnature	e Doe				
Approved by					John E					
		(State Deputy)			Name					
					4357 N	Main St				
					Street					
-	(Da	ite)			Sunsh	ine		FL	3	33333
				-	City			State/Prov.	Zip/Pos	stal Code

g. Now it is time to save the signed document. Once you have signed the form, Acrobat Reader will not allow you to save it to the same filename. So, when you try to Save, you will get the following dialog box:

Acrobat Reader		×
This document restricts some Adobe Acrobat features Adobe Acrobat Reader. To create a copy of the docum extended features in Adobe Acrobat Reader), click Sav	ent that is not restr	
	Save a Copy	Cancel

You must click Save a Copy to save your signed document to a new file (such as DD99\_1st Qtr 2022 signed.pdf).

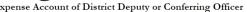
Once you have saved the new file with the signature, you will be returned to the original form. Since you cannot save the form to the original filename, you must exit the form without saving. This means that the original file will be the form without the signature.

If you then open up your signed form—the one you saved as a new file, which in this example, is DD99\_1st Qtr 2022 signed.pdf—you will note that you can no longer edit the file (see example on the next page—the blue highlighting of the data on the form has disappeared.) This is the file to send to the State Secretary for submission.

**<u>Receipts</u>**. As noted previously, receipts must be submitted for every expense except mileage. That means receipts for tolls are required. <u>Receipts must be submitted as pdf files, not as image files.</u> Preferably, all receipts should be consolidated into a single pdf file. The receipt pdf file should be separate from the Form 267DD pdf file.



## Knights of Columbus Expense Account of District Deputy or Conferring Officer





Date	Travel			Round	Transportation	*Room	*Meals	*Misc. Total	
	From	То		Trip Mileage	at .30 per mile		moulo		. ctur
1/4/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.5
1/6/0222	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.6
1/10/2022	Sunshine, FL	Dawn, FL	Council 77777 Bus Mtg	25	7.50				7.5
1/12/2022	Sunshine, FL		Council 55555 Bus Mtg	18	5.40				5.4
2/1/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.
/3/2022	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.
/9/2022	Sunshine, FL		Council 55555 Bus Mtg	18	5.40				5.
/14/2022	Sunshine, FL		Council 77777 Bus Mtg	25	7.50				7.
/1/2022	Sunshine, FL	Sundown, FL	Council 99999 Bus Mtg	48	14.40			2.10	16.
/3/2022	Sunshine, FL	Lakefront, FL	Council 88888 Bus Mtg	12	3.60				3.
/9/2022	Sunshine, FL		Council 55555 Bus Mtg	18	5.40				5.
8/14/2022	Sunshine, FL		Council 77777 Bus Mtg	25	7.50				7.
	1								
	+			_					
	+	-		_					
	+								
				_					
				TOTALS	92.70	0.00	0.00	6.30	99

\*Receipts are required for all items

Approved by

(State Deputy)

(Date)

I hereby certify the foregoing to be a true and correct statement of expenses incurred by me.

John Doc		
Signature		
John Doe		
Name		
4357 Main St		
Street		
Sunshine	FL	33333
City	State/Prov.	Zip/Postal Code
9876543	ç	99

District Number

Membership Number

#### Special Instructions for Organizational and Mid-Year Meetings (NOT STATE CONVENTIONS!)

For the Organizational and Mid-Year Meetings, DDs are authorized to expense the following:

- a. Round trip mileage and tolls;
- b. One or two nights for hotel, depending on authorization received by the State Deputy from Supreme;
- c. Up to two meals per day;
- d. Parking, if free parking at the hotel is not available; and
- d. One or two days of spouse per diem at \$35 per day.

#### ALL OF THESE EXPENSES EXCEPT THE SPOUSE PER DIEM CAN BE PUT ON A SINGLE LINE IN Form

**267DD!!** Most of us are used to business trip expense reports with multiple line items indicating specific expenses, with one expense report submitted for each trip. However, the Supreme Form 267DD is designed to report multiple trips on a single form, with each line on the form constituting a single trip. So, instead of reporting mileage on one line, meals on another line, etc., you should report all expenses for each meeting on a single line! The exception is the Spouse per diem, as this is technically a spouse expense, and there is a need to separate this from your expenses.

You must submit the expense for the Organizational or Mid-Year meeting on a Form 267DD separate from your other trip expenses. We submit the DD expense reports for these meetings in bulk, and so we need to have these forms clear of other expenses.

Here is an example for a DD attending the 2022 Organizational Meeting:

(1) Round Trip Mileage of 100 miles. This would be entered in the Round Trip Mileage column.

(2) Hotel for two nights at \$124.75 per night. (This would include the room and taxes, but would NOT include meals or other expenses charged to the room.) Then \$249.50 would be entered in Room column. <u>Receipt is required</u>.

(3) Expenses for two meals per day for two days: \$19.79, \$21.32, \$25.10, \$15.32. These expenses are for your meals only; you cannot include your wife's meal expenses, and you cannot expense "group" meals. The total for these meals is \$81.53, which would be entered in the Meals column. <u>Receipts for each meal are required, and each receipt must have a date.</u>

(4) There are three types of Miscellaneous expenses, which will be entered under the Misc column.

- (a) Parking. Example: \$10.35 per night for two nights is \$20.70. <u>Receipt is required</u>.
- (b) Tolls. Example: Round Trip tolls are \$3.75. <u>Receipts are required</u>.

(c) Spouse per diem. This item (\$70) is entered as a <u>separate line</u> under the Misc column. <u>No receipt</u> <u>required.</u>

In this case, the total for the Misc column on the first line is \$24.45, and for the second line it is \$35.

A completed form with the above expenses is shown below:

1

# Knights of Columbus Expense Account of District Deputy or Conferring Officer



Date Tr		ravel	Purpose/Council Number		Transportation	*Room	*Meals	*Misc.	Total
	From	То		Mileage	at .30 per mile				
7/15/2022	Sunshine, FL	Kissimmee, FL	2022 Organizational Meeting Jul 15-16	186	55.80	249.50	81.53	24.45	411.28
7/15/2022			DD Spouse Per Diem					70.00	70.00