Prior Approval for Working Lunch and Refreshment/Break Service

New Smartsheet Form User Guide

August 2026

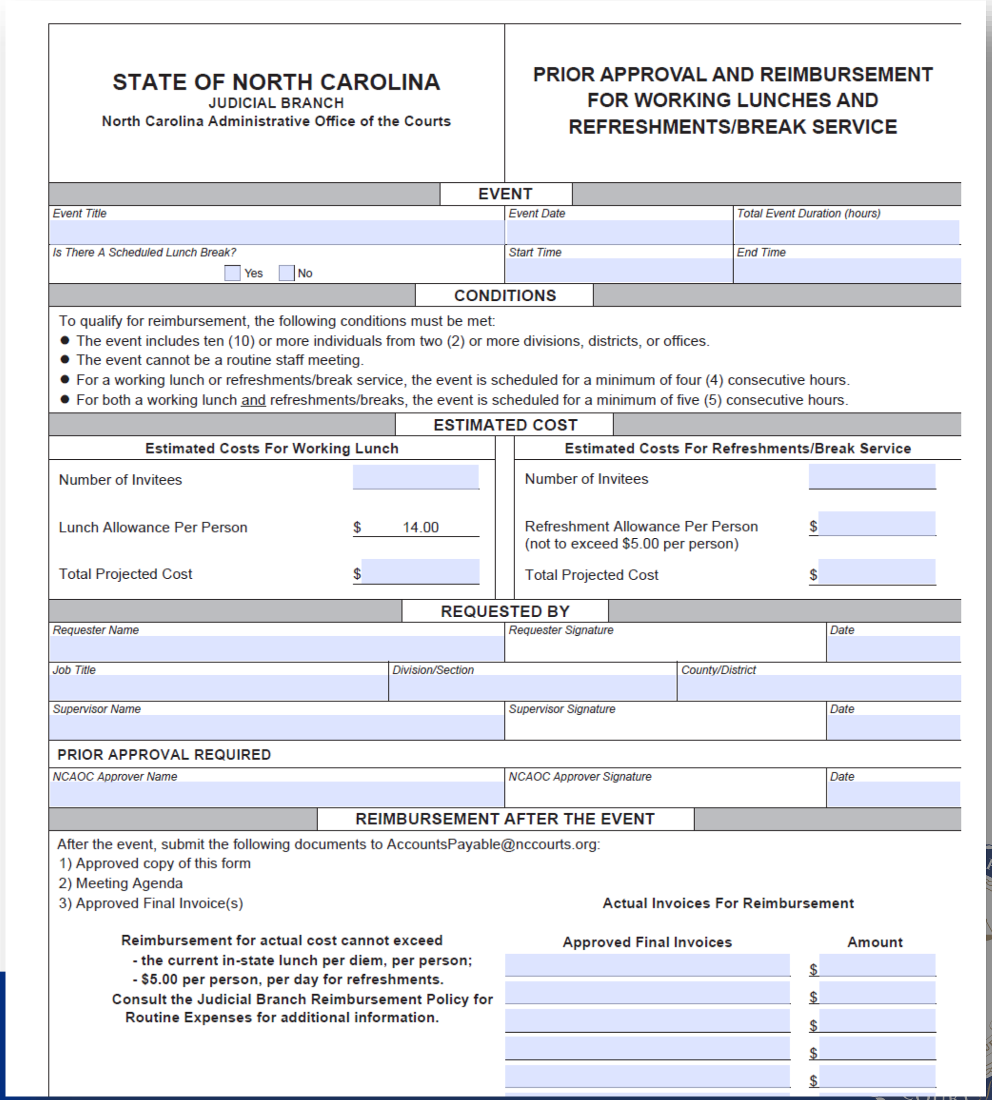
New Smartsheet Form

- There is a new form to request prior approval for working lunches and refreshments/break service for eligible meetings and events.
- Consult the Judicial Branch *Reimbursement Policy for Routine Expenses* for specific information on allowable expenses and the approval process
- Bookmark these link for easy access!

Form:https://www.nccourts.gov/documents/forms/prior-approval-and-reimbursement-for-working-lunches-and-refreshmentsbreak-service

Policy: https://juno.nccourts.org/policies/judicial-branch/reimbursement-policy-routine-expenses

Replacing the AOC-A-214 form



STATE OF NORTH CAROLINA
JUDICIAL BRANCH
North Carolina Administrative Office of the Courts

PRIOR APPROVAL AND REIMBURSEMENT FOR WORKING LUNCHES AND REFRESHMENTS/BREAK SERVICE

EVENT

Event Title	Event Date	Total Event Duration (hours)
Is There A Scheduled Lunch Break? ☐ Yes ☐ No	Start Time	End Time

CONDITIONS

To qualify for reimbursement, the following conditions must be met:
- The event includes ten (10) or more individuals from two (2) or more divisions, districts, or offices.
- The event cannot be a routine staff meeting.
- For a working lunch or refreshments/break service, the event is scheduled for a minimum of four (4) consecutive hours.
- For both a working lunch and refreshments/breaks, the event is scheduled for a minimum of five (5) consecutive hours.

ESTIMATED COST

Estimated Costs For Working Lunch		Estimated Costs For Refreshments/Break Service	
Number of Invitees		Number of Invitees	
Lunch Allowance Per Person	$ 14.00	Refreshment Allowance Per Person (not to exceed $5.00 per person)	$
Total Projected Cost	$	Total Projected Cost	$

REQUESTED BY

Requester Name	Requester Signature	Date
Job Title	Division/Section	County/District
Supervisor Name	Supervisor Signature	Date

PRIOR APPROVAL REQUIRED

NCAOC Approver Name	NCAOC Approver Signature	Date

REIMBURSEMENT AFTER THE EVENT

After the event, submit the following documents to AccountsPayable@nccourts.org:
1) Approved copy of this form
2) Meeting Agenda
3) Approved Final Invoice(s)

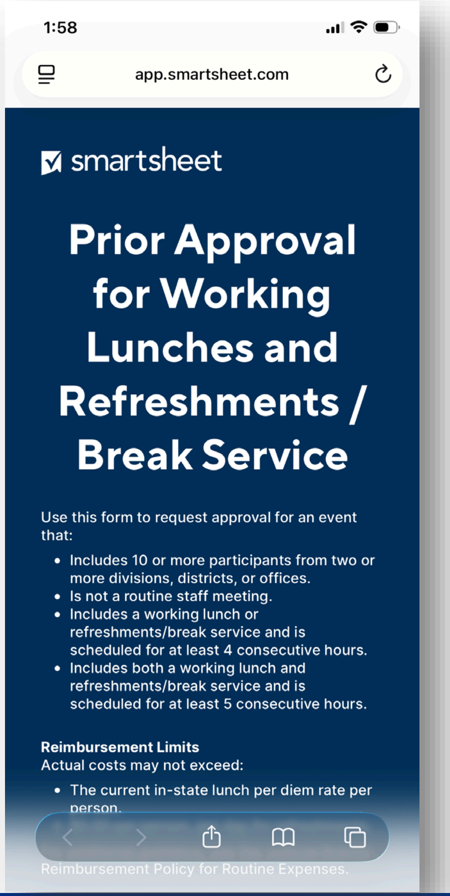
Reimbursement for actual cost cannot exceed
- the current in-state lunch per diem, per person;
- $5.00 per person, per day for refreshments.
Consult the Judicial Branch Reimbursement Policy for Routine Expenses for additional information.

Actual Invoices For Reimbursement

Approved Final Invoices	Amount
	$
	$
	$
	$
	$

New Smartsheet Form

Available on mobile…


1:58

app.smartsheet.com

smartsheet

Prior Approval for Working Lunches and Refreshments / Break Service

Use this form to request approval for an event that:

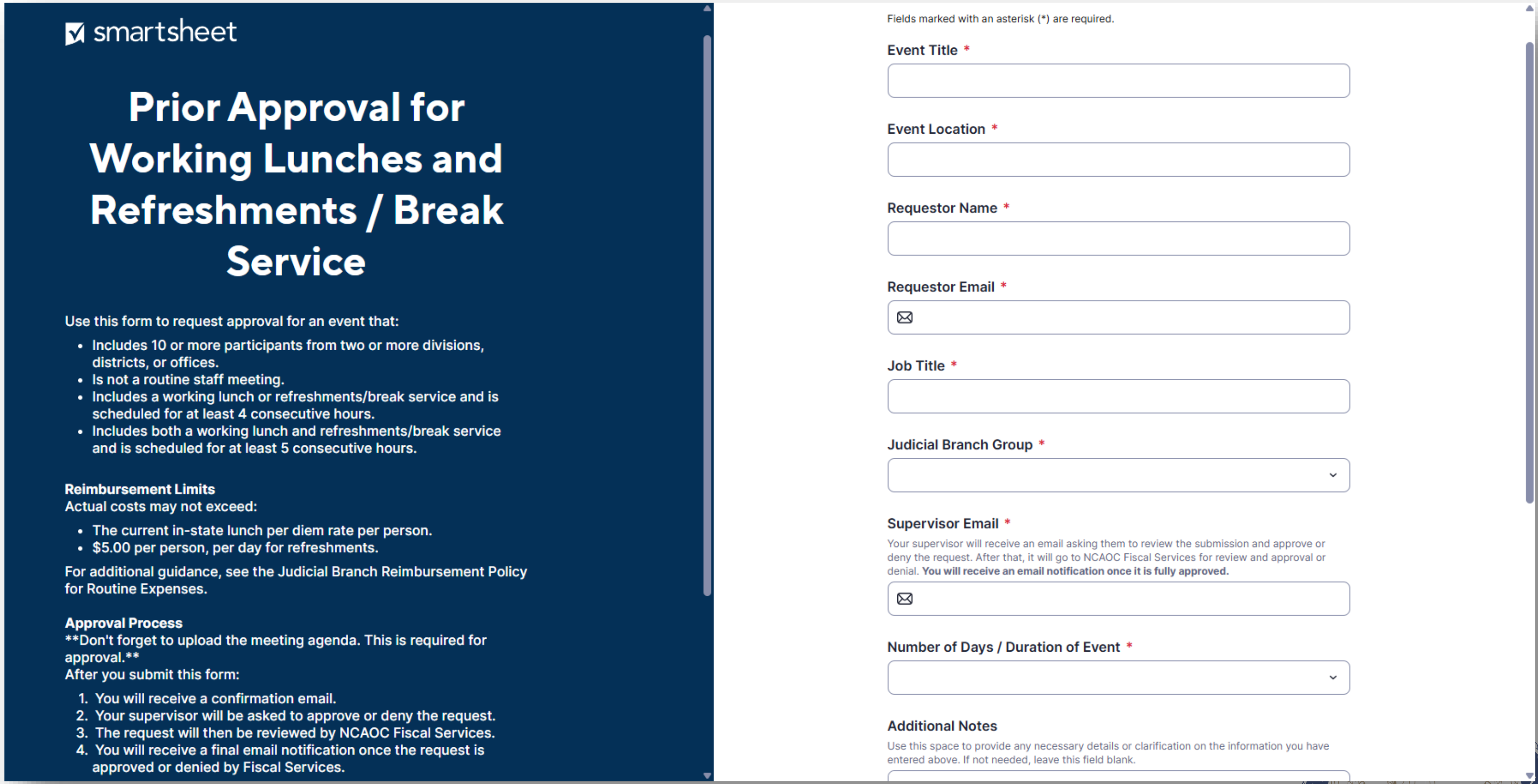
- Includes 10 or more participants from two or more divisions, districts, or offices.
- Is not a routine staff meeting.
- Includes a working lunch or refreshments/break service and is scheduled for at least 4 consecutive hours.
- Includes both a working lunch and refreshments/break service and is scheduled for at least 5 consecutive hours.

Reimbursement Limits
Actual costs may not exceed:

- The current in-state lunch per diem rate per person.

Reimbursement Policy for Routine Expenses.

…or desktop browsers


smartsheet

Prior Approval for Working Lunches and Refreshments / Break Service

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- Includes both a working lunch and refreshments/break service and is scheduled for at least 5 consecutive hours.

Reimbursement Limits
Actual costs may not exceed:

- The current in-state lunch per diem rate per person.
- $5.00 per person, per day for refreshments.

For additional guidance, see the Judicial Branch Reimbursement Policy for Routine Expenses.

Approval Process
Don't forget to upload the meeting agenda. This is required for approval.
After you submit this form:

1. You will receive a confirmation email.
2. Your supervisor will be asked to approve or deny the request.
3. The request will then be reviewed by NCAOC Fiscal Services.
4. You will receive a final email notification once the request is approved or denied by Fiscal Services.

Fields marked with an asterisk (*) are required.

Event Title *

Event Location *

Requestor Name *

Requestor Email *

Job Title *

Judicial Branch Group *

Supervisor Email *

Your supervisor will receive an email asking them to review the submission and approve or deny the request. After that, it will go to NCAOC Fiscal Services for review and approval or denial. **You will receive an email notification once it is fully approved.**

Number of Days / Duration of Event *

Additional Notes

Use this space to provide any necessary details or clarification on the information you have entered above. If not needed, leave this field blank.

Fields marked with an asterisk (*) are required.

Event Title *

Event Location *

Requestor Name *

Requestor Email *

Job Title *

Judicial Branch Group *

Supervisor Email *

Your supervisor will receive an email asking them to review the submission and approve or deny the request. After that, it will go to NCAOC Fiscal Services for review and approval or denial. **You will receive an email notification once it is fully approved.**

Number of Days / Duration of Event *

Day 1

Date *

mm/dd/yyyy

Start Time *

End Time *

Lunch? *

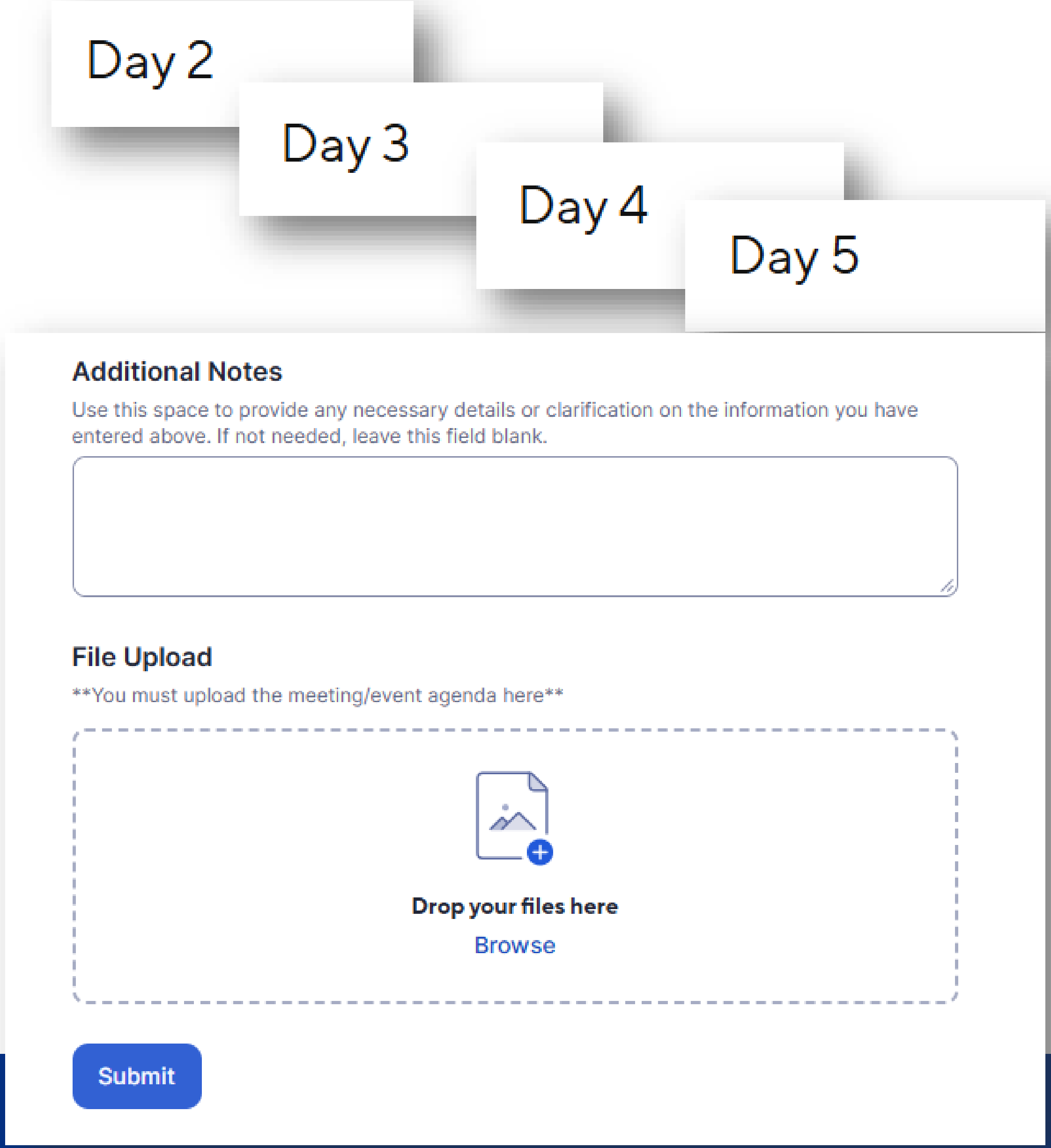
- For a working lunch or refreshments/break service, the event must be scheduled for a minimum of four (4) consecutive hours.
- For both a working lunch and refreshments/breaks, the event must be scheduled for a minimum of five (5) consecutive hours.

Additional information is available in the Judicial Branch Reimbursement Policy for Routine Expenses.

Breaks?

- For a working lunch or refreshments/break service, the event must be scheduled for a minimum of four (4) consecutive hours.
- For both a working lunch and refreshments/breaks, the event must be scheduled for a minimum of five (5) consecutive hours.

Additional information is available in the Judicial Branch Reimbursement Policy for Routine Expenses.


Day 2

Day 3

Day 4

Day 5

Additional Notes

Use this space to provide any necessary details or clarification on the information you have entered above. If not needed, leave this field blank.

File Upload

You must upload the meeting/event agenda here

Drop your files here

Browse

Submit

Additional tips:

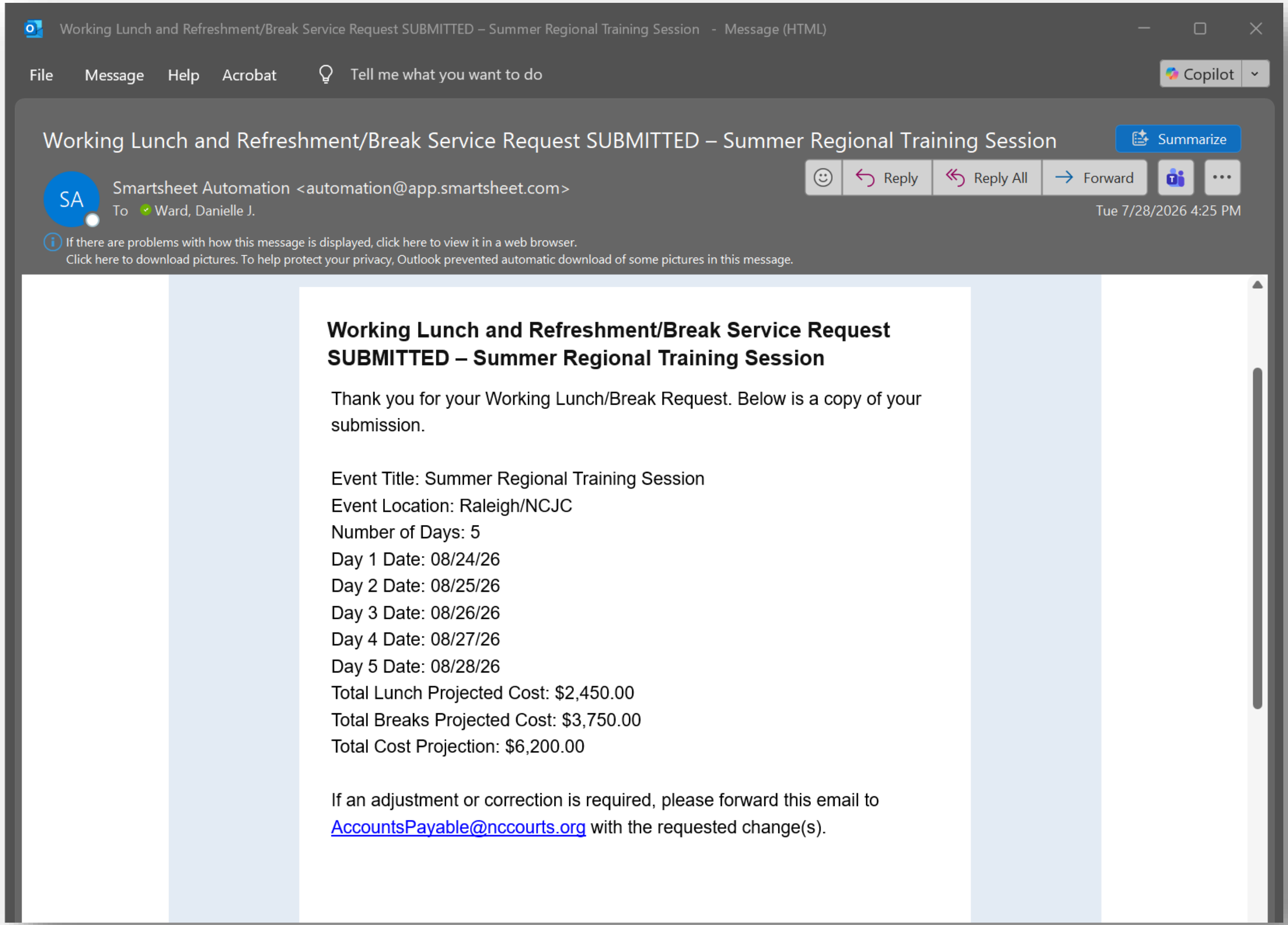
- Complete as many "days" as you need for your meeting or event.
- Be sure to include your supervisor's email address so that he or she can review and approve or deny the request. The request will not move forward without the supervisor clicking "approve."
- If your meeting or event includes breakfast or another situation that is not already captured on the form please provide that information in the Additional Notes field.
- If these expenses should be paid from grant or special funds please provide that information in the Additional Notes field.

Per Diem and Break Service Rates

Subsistence and Per Diem Reimbursement Rates		Travel On or After August 1, 2025	
		In-State	Out-of-State
Custom Amount:	Breakfast	$10.60	$10.60
	Lunch	$14.00	$14.00
	Dinner	$24.40	$27.70
Break Service (per person, per day)		$5.00	$5.00

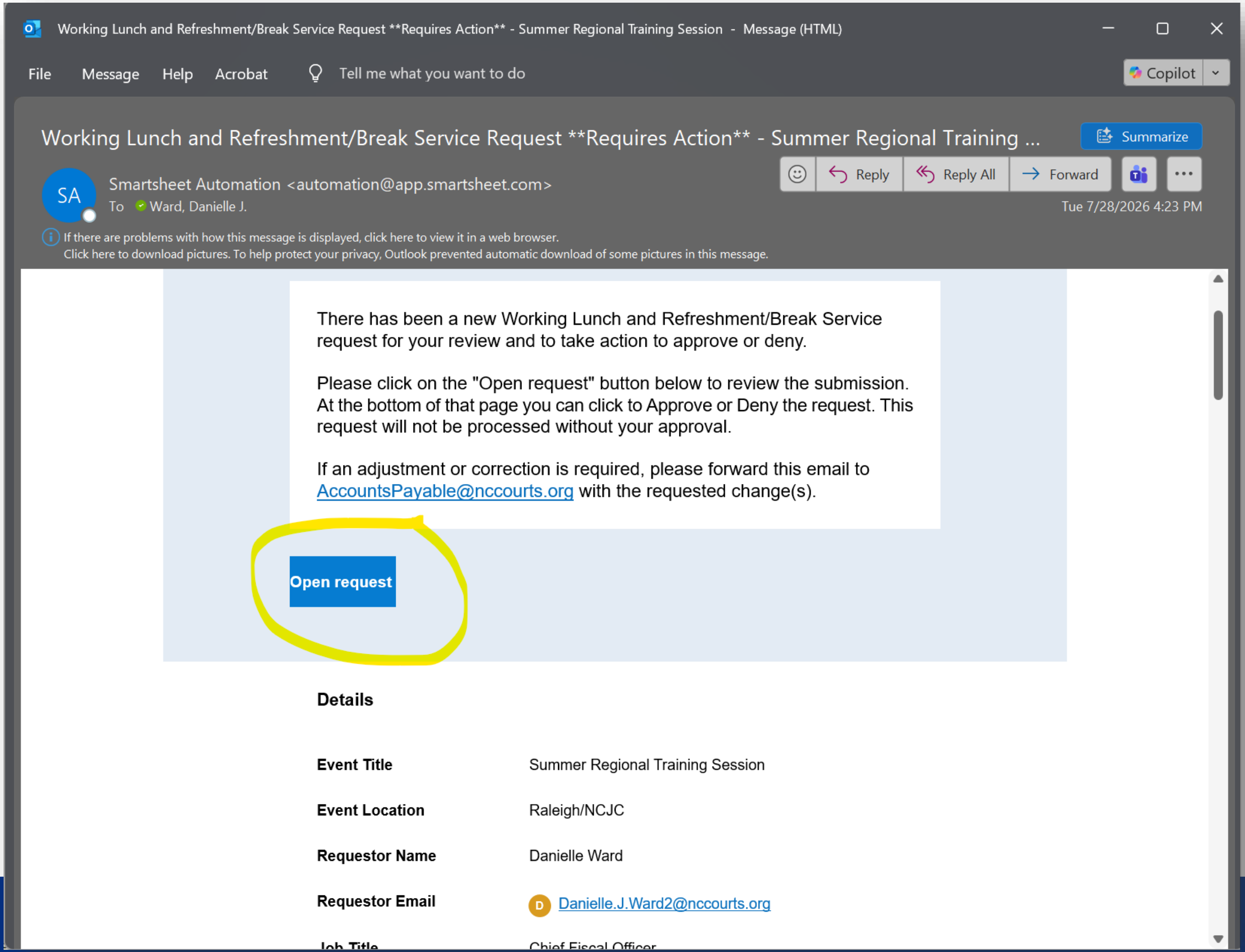
- The per diem rates are set by the Office of State Budget and Management and are applicable statewide (they do not vary by county/location)
- An itemized receipt showing the expense was paid is always required to be reimbursed
- Consult the Judicial Branch *Reimbursement Policy for Routine Expenses* for specific information on allowable expenses and the approval process https://juno.nccourts.org/policies/judicial-branch/reimbursement-policy-routine-expenses

1) Confirmation of Submission



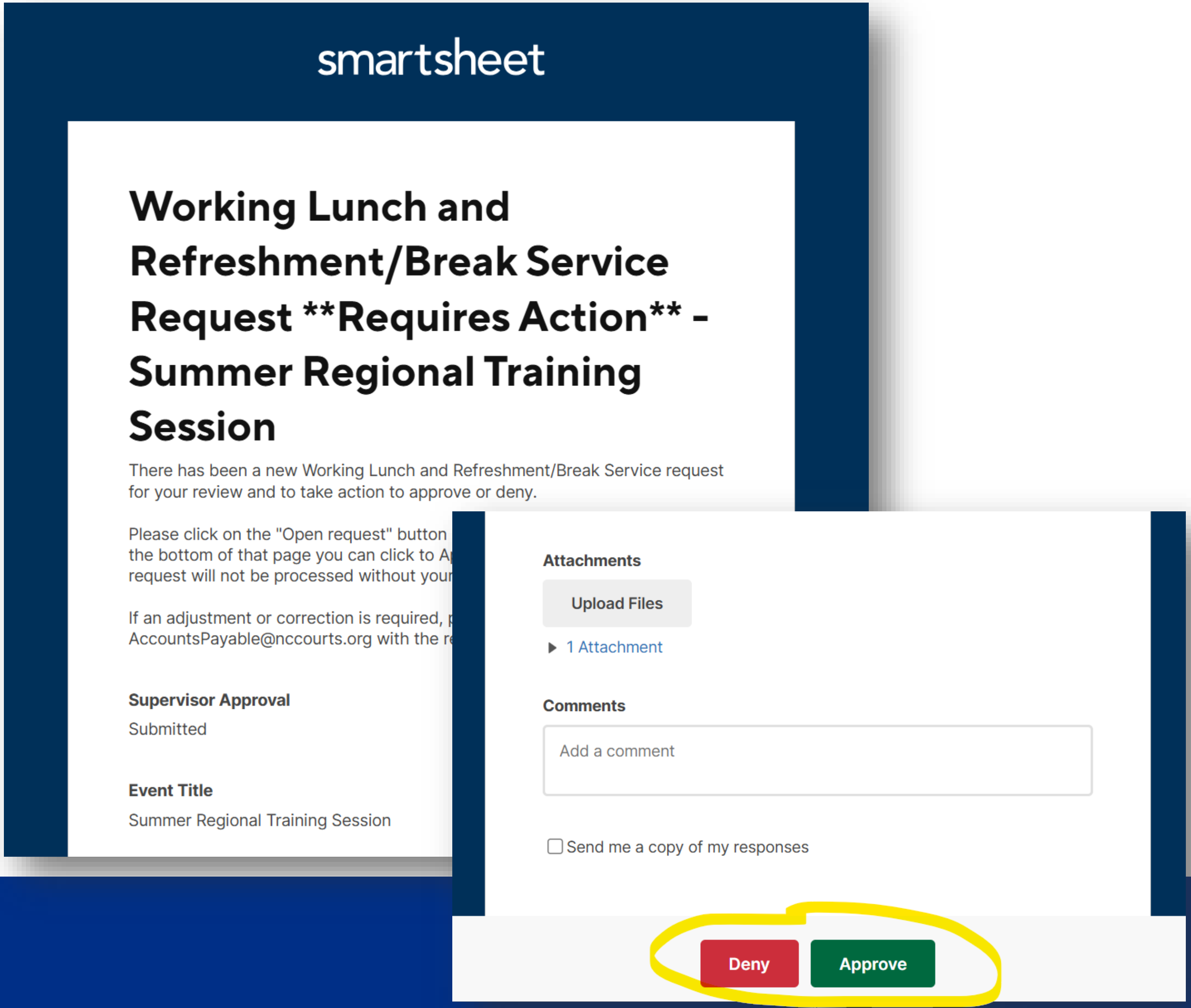
- After submitting the Smartsheet form, the requestor will receive a confirmation email with a summary of the request and further instructions
- If an adjustment or correction is required, the request should be forwarded to AccountsPayable@nccourts.org
- The supervisor will be asked to approve or deny the request. If approved, the request will then be reviewed by the Expense Approver (Fiscal Services)
- The requestor will receive a final email notification once the request is approved or denied by the Expense Approver

2) Supervisor Email **Requires Action**



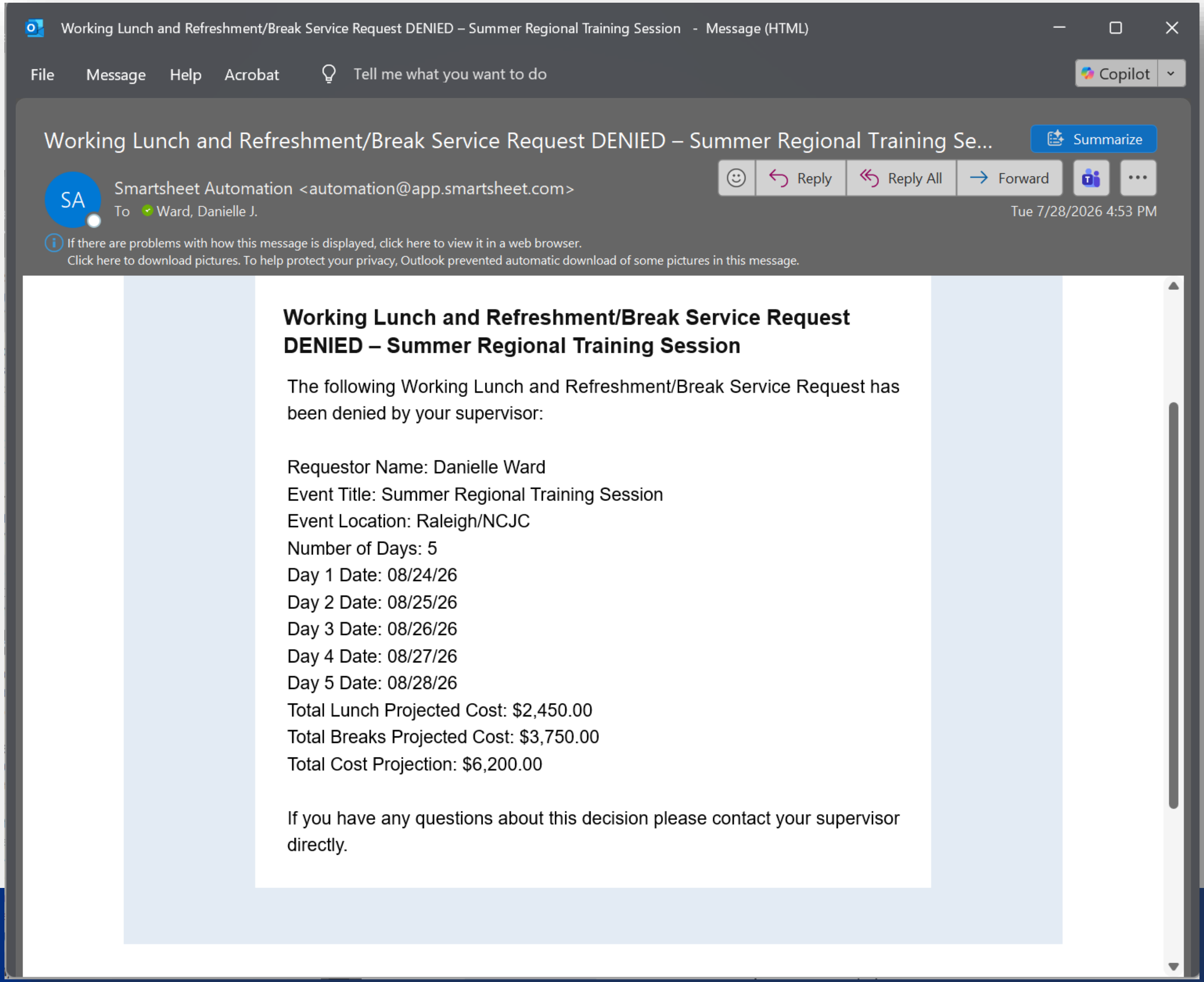
- The supervisor will receive an email with instructions to review the details and take action (to approve or deny the request)
- Once the supervisor clicks the “Open request” button the full request will appear in a new webpage

2) Supervisor Email, cont.



- The supervisor can scroll the webpage to view the full details, including accessing any attachments that were included in the submission
- At the bottom of the page are buttons to <u>approve</u> or <u>deny</u> the request
- If approved by the supervisor, the request will then route to the Judicial Branch's Expense Approver (Fiscal Services) for final review

3) If denied by Supervisor



Working Lunch and Refreshment/Break Service Request DENIED – Summer Regional Training Session

The following Working Lunch and Refreshment/Break Service Request has been denied by your supervisor:

Requestor Name: Danielle Ward
Event Title: Summer Regional Training Session
Event Location: Raleigh/NCJC
Number of Days: 5
Day 1 Date: 08/24/26
Day 2 Date: 08/25/26
Day 3 Date: 08/26/26
Day 4 Date: 08/27/26
Day 5 Date: 08/28/26
Total Lunch Projected Cost: $2,450.00
Total Breaks Projected Cost: $3,750.00
Total Cost Projection: $6,200.00

If you have any questions about this decision please contact your supervisor directly.

- If the supervisor denies the request, the requestor will receive an email letting them know of the decision

- The requestor should contact the supervisor directly for more information, if needed, instead of Accounts Payable/ Fiscal Services

4) If Fully Approved

Working Lunch and Refreshment/Break Service Request APPROVED – Summer Regional Training Session - Message (HTML)

File Message Help Acrobat Tell me what you want to do Copilot

Working Lunch and Refreshment/Break Service Request APPROVED – Summer Regional Trainin...

Summarize

SA Smartsheet Automation <automation@app.smartsheet.com>

To Ward, Danielle J.

Reply Reply All Forward

Wed 7/29/2026 2:14 PM

Follow up. Start by Wednesday, July 29, 2026. Due by Wednesday, July 29, 2026.
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Working Lunch and Refreshment/Break Service Request APPROVED – Summer Regional Training Session

The following Working Lunch and Refreshment/Break Service Request has been approved:

Requestor Name: Danielle Ward
Event Title: Summer Regional Training Session
Event Location: Raleigh/NCJC
Number of Days: 5
Day 1 Date: 08/24/26
Day 2 Date: 08/25/26
Day 3 Date: 08/26/26
Day 4 Date: 08/27/26
Day 5 Date: 08/28/26
Total Lunch Projected Cost: $2,450.00
Total Breaks Projected Cost: $3,750.00
Total Cost Projection: $6,200.00

After the event:

If you paid out of pocket: Forward the approval confirmation and receipts to AccountsPayable@nccourts.org to request reimbursement. OR
If a vendor will be paid directly: Forward the approval confirmation and invoice(s) to AccountsPayable@nccourts.org to initiate payment.

- If approved by the supervisor <u>and</u> the Expense Approver, the requestor will receive this final email notification.
- This email includes instructions about initiating payment or reimbursement

Payment or Reimbursement ?

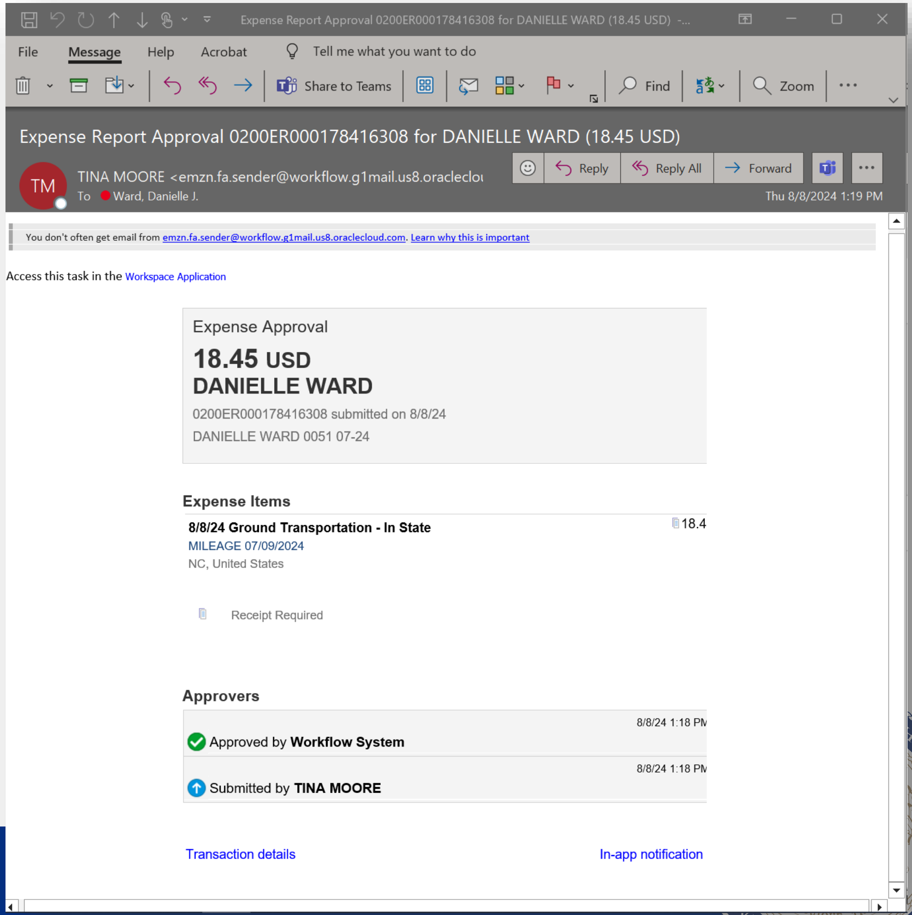
- **If the vendor will be paid directly:** the requestor should forward the final approval confirmation email and the invoice(s) to AccountsPayable@nccourts.org to initiate payment.

- **If the requestor paid out-of-pocket:** the requestor should forward the final approval confirmation email to and the receipt(s) to AccountsPayable@nccourts.org to initiate reimbursement.

- Need assistance?

Contact AccountsPayable@nccourts.org

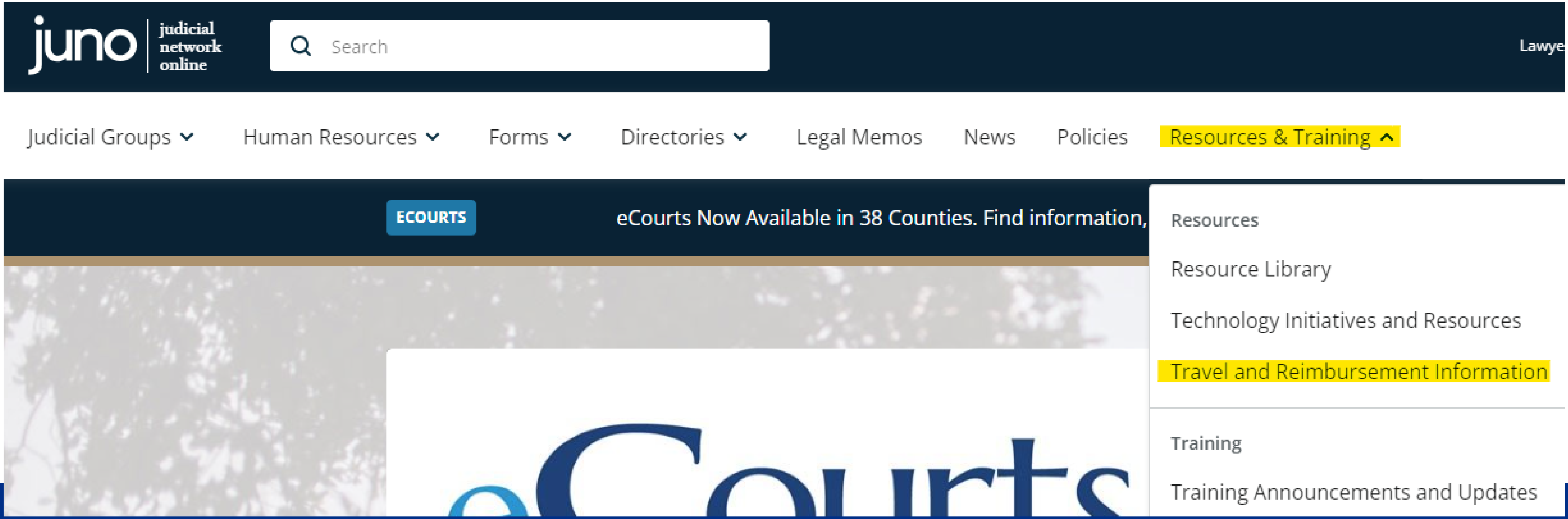
Similar to travel reimbursements, the requestor will receive a system-generated message from the accounting system when the reimbursement has been processed.



Additional Questions?

Contact us if you have additional questions or need assistance
AccountsPayable@nccourts.org

Visit the *Travel and Reimbursement Information* page on Juno (via the *Resources and Training* tab) for links to policies and forms



Resources on Juno

Visit this page on Juno for links to relevant policies…

Travel and Reimbursement Information

Summary

Learn how to book business travel and request reimbursement for travel and other routine expenses.

Policies

There are several Judicial Branch policies that provide information on allowable expenses and the required processes and forms that must be utilized to request reimbursement. All policies and forms are available on Juno.

- **Employees and Judicial Officials** are covered by the Judicial Branch Travel Policy, which describes allowable expenses for lodging, meals, transportation, and the travel approval process for any employee whose position is paid in whole or in part by state, federal, local, or grant funds.
- **Members of Boards, Commissions, Committees and Councils** and other non-employees who are not serving in a case-related capacity are covered by the Judicial Branch Travel Policy.
- **Fact witnesses and victims** are covered by the Fact Witness Attendance Policy.
- **Expert witness** fee and travel policies can be found in the Expert Witness Fee Policy.
- **Subsistence, per diem, lodging, and mileage rates** can be found in Appendix B of the Judicial Branch Travel Policy.

Related Links

Judicial Branch Travel Policy

Reimbursement Policy for Routine Expenses

Travel Reimbursement Request Form (AOC-A-25)

Request for Special Travel and Training (AOC-A-182)

Job Aid: Travel Approval Process Flow

Subject

Finance

Travel

Resources on Juno

… as well as forms and additional resources.

Forms

The frequently used forms for travel and other reimbursement requests are listed below and are available on Juno. All forms should be submitted via email as PDF documents for prompt processing.

- Travel Reimbursement Request (AOC-A-25) should be submitted to AccountsPayable@nccourts.org within 30 days after the travel is completed.
- Request for Special Travel and Training (AOC-A-182) is used for prior approval of certain i
- Employment Payment Verification Form (AOC-A-224) allows employees to sign up for dire payments (this is a different system than the payroll direct deposit).
- Reimbursement of Authorized Petty/Emergency Purchases (AOC-A-7) should be used for expenses and other routine non-travel related reimbursements.
- Prior Approval and Reimbursement for Working Lunches and Breaks (AOC-A-214) is requ working lunches and refreshments/break service for meetings and events.
- Reimbursement of Travel and Other Expenses Incurred by Non-Employees (AOC-A-267) attending Judicial Branch-sponsored events or engaging in Judicial Branch business.
- Employee Travel Advance Request (AOC-A-212) for employees who travel on official Judici personal funds be minimally required.
- In-State and Out-of-State Witness Attendance Form (AOC-CR-235) is used to certify servic witnesses.
- Witness Attendance – Certification of Identity, Side Two (AOC-CR-382) is used to provide order for AOC to process payment.

Resources

Federal GSA Per Diem Rates

Actual lodging in excess of standard state lodging rates is eligible for reimbursement up to the federal GSA lodging rates by city/county in effect at the time of travel, when the standard state lodging rate is not attainable or when there is a personal safety concern. This applies to in-state and out of-state travel.

Maupin Travel: The Judicial Branch's Travel Agent

The Judicial Branch contracts with Maupin Travel to provide travel reservations and arrangements for employees, certain victims, fact witnesses, and contract interpreters. Airline reservations and hotel/lodging arranged though Maupin may be paid directly by NCAOC, in order that personal funds be minimally required. Maupin Travel can be accessed via an online portal or with assistance from a live agent over the phone.

Job Aid: Travel Approval Process Flow

Consult this flow chart to determine the steps required to obtain prior approval for your specific type of travel or training / event.

Thank You

Fiscal Services Division

Accounts Payable Team

AccountsPayable@nccourts.org