

**2012 UWO FACULTY ASSOCIATION (FULL-TIME)
PROFESSIONAL EXPENSE REIMBURSEMENT
INSTRUCTIONS FOR COMPLETING CLAIM FORM**

1. Type or print legibly. Shaded areas are for Financial Services use.
2. The base amount of the Professional Expense Reimbursement (PER) for 2012 is \$400.00. In November 2011 for 2012, you were given the option to allocate additional Flex Credits up to \$900.00 to your PER and/or to your Health Care Spending Account (HCSA) in \$100.00 increments. If you did not make an election, by default, \$700.00 in flex credits were automatically allocated into your PER and \$200 to your HCSA.
3. A link to [full details on your Flex Credits](#), PER and HCSA options can be found on the [Western Human Resources website](#) under "Benefits". An [FAQ](#) is also available.

To see your current balance in your PER, [click here](#) or go to the Finance website at <http://uwo.ca/finance/> and choose the "Western Financials Login" button. Your regular Western user ID and password work here. Choose "Employee Self-Service", then "Professional Expense Inquiry". You will see any carry forward from the previous year, your entitlement this year, any claims you have made in the current year, as well as the current balance in the account.
4. There is full carry forward of any unspent amounts from 2010, 2011 and 2012 to any subsequent year during the term of the Collective Agreement (end March 31, 2014). Further carry forward is subject to negotiations.
5. **Receipts for the 2011 allocation year must be submitted for reimbursement by March 31, 2013.** Eligible full-time Members may submit a claim for reimbursement at any time, as long as the claim is for eligible expenses greater than \$500.00.
6. If your banking information is on file in the Human Resources system, your PER will be paid by direct deposit to your payroll bank account.
7. The claim form, with original receipts attached, must be signed by the Member, and then forwarded to the Department Chair's or School Director's Office (or in the case of Faculties/Schools without departments, to the Dean's Office) for approval. The Dean or Department Chair/School Director is responsible for reviewing the claim and ensuring that the listed expenses pertain to the Member's specific discipline or teaching duties prior to approving the payment.
8. The original receipts should indicate clearly the amount paid and the nature of the expenditure. For example, a cash register tape from a supplier must be supplemented by a description of the item being purchased. In the case of Internet access, submission of receipts from the start of the service in that calendar year and two subsequent receipts showing continuation of the service throughout the year is required.
9. The following expenses incurred by faculty members are eligible for reimbursement:
 - membership fees for professional and/or learned societies related to the Member's discipline;
 - subscriptions to professional and/or learned journals;
 - books, instruments, supplies, materials, computer software, the purchase or lease of equipment and services (see Note 9);
 - registration fees for the Member to attend scholarly conferences;
 - transportation, food and accommodation, according to the University travel policies, for the Member for professionally related courses, conferences, meetings, seminars or workshops and to visit other universities or research sites to conduct research and scholarly work; and
 - page and reprint charges or costs incurred in the preparation and completion of scholarly manuscripts.
10. **To be eligible, equipment must be used primarily for work purposes.** Furniture and upgrades/software for personal computers are not eligible. Upgrades to University-owned computers are acceptable. Personal use of equipment should be incidental, less than 10%. The reimbursement must purchase the equipment outright without contribution from the Member. **Equipment receipts can only be submitted when there are sufficient funds in the Member's PER account to cover the full cost of the equipment.** All equipment purchased is the property of The University of Western Ontario. Equipment is not eligible in the year of retirement.
11. Financial Services will retain all original receipts. If the receipts total more than the maximum allowable claim and the Member wishes to have receipts returned for another purpose, Financial Services will mark the amount which was reimbursed by UWO on the original receipt, photocopy the receipt for their records, and return the defaced original.
12. The provisions of the Professional Expense Reimbursement program are subject to the relevant provisions of the Income Tax Act and any interpretations made by Canada Revenue Agency (CRA). The Member accepts responsibility for any subsequent adverse judgment by CRA.

**PROFESSIONAL EXPENSE REIMBURSEMENT
FULL-TIME FACULTY
FOR JAN. 1, 2012 to MAR. 31, 2013
SEE INSTRUCTIONS ON PAGE 1**



**THE UNIVERSITY OF WESTERN ONTARIO
FINANCIAL SERVICES
TRAVEL SECTION, EXT. 85499
SUITE 6100, SUPPORT SERVICES BLDG.
Travel@uwo.ca**

CONTROL# **DATE** **UWO EMPLOYEE NUMBER (MANDATORY)**

SURNAME (Please Print) **GIVEN NAME**

FACULTY/SCHOOL/DEPARTMENT (or off-campus address) **PHONE NUMBER** **EXTENSION**

ROOM NUMBER - BUILDING (or off-campus address) **E-MAIL**

CITY **POSTAL CODE**

MAXIMUM REIMBURSEMENT
(See Note 2 on page 1)

Expense Category	Details (Name of Association/Supplier, Business Purpose, Dates covered)	Receipt Total	Deduct Personal/ Previously Claimed	Claim CAD\$
Membership / Registration Fees				
Computer Software				
Equipment (See Note 6 over)				
Travel Expenses (State purpose)				
Supplies (including – subscriptions, reprints, Internet and books)				

ORIGINAL RECEIPTS MUST BE ATTACHED.
FILING DEADLINE IS MARCH 31, 2013.

DO NOT WRITE IN SHADED AREAS

Total \$

	SPEED CODE	ACCOUNT	TOTAL	GST/HST
Membership/ Registration Fees	PBM1	631400		
Computer Software	PBM1	621250		
Equipment	PBM1	605400		
Travel Expenses	PBM1	645000		
Supplies	PBM1	622000		
		TOTAL		

SIGNATURE OF CLAIMANT SIGNATURE OF CHAIR/DIRECTOR/DEAN/VICE-PRESIDENT