

2011 PROFESSIONAL MANAGERIAL ASSOCIATION
PROFESSIONAL EXPENSE REIMBURSEMENT
INSTRUCTIONS FOR COMPLETING CLAIM FORM

1. Type or print legibly. Shaded areas are for Financial Services use.
2. For 2011 you were provided with flexible credits (Flex Credits) of \$600. In November 2010 for 2011, you were given the option to allocate those credits to your Professional Expense Reimbursement (PER) account and/or to your Health Care Spending Account (HCSA) in \$100.00 increments. If you did not make an election, the entire \$600.00 in credits was automatically allocated to your PER for 2011.
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.
4. 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.
5. Unspent 2009 PER allocations can be used for expenses incurred up to December 31, 2011 and receipts must be submitted no later than January 31, 2012. Unspent 2010 PER allocations and those in 2011, 2012, and 2013 may be carried forward into subsequent years of the PMA/Western agreement (ending in 2014). Further carry forward is subject to negotiations.
Important: Although unspent amounts may be carried forward, claims for any year must be submitted by March 31st of the following year. Thus, the deadline to submit 2011 expenses for reimbursement is March 31st of 2012. Forward all forms and receipts to Financial Services, Suite 6100, Support Services Building.
6. PMA-eligible members may make up to two submissions per year.
7. 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.
8. The claim form, with original receipts attached, must be signed by the staff member, then reviewed and signed by his/her supervisor. This reimbursement must relate to expenses incurred during the course of employment at The University of Western Ontario and assist PMA staff in their professional development.
9. 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. For Internet access expenses, 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.
10. The following expenses incurred by staff members are eligible for reimbursement.
 - Memberships in professional associations (excluding PMA memberships);
 - Registrations to conferences;
 - Course tuition (may be covered under Education Assistance Policy 6.9, please consult Human Resources);
 - Computer software (related to the staff member's work); See **Note** below.
 - Travel expenses related to professional development (transportation, accommodation, meals);
 - Subscriptions – (excluding newspapers), journals, books related directly to the individual's role at UWO;
 - Supplies (related to the staff member's work) – ink cartridges, course textbooks, Internet access, etc.;
- Note:** Equipment is eligible and remains the property of The University of Western Ontario. The equipment must be used primarily for work purposes. Personal use of equipment should be incidental, less than 10%. The reimbursement must purchase the equipment outright. There can be no financial contribution from the Member. Upgrades and software for personal computers are not eligible. Upgrades to University-owned computers are acceptable. Furniture is not eligible. 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.
11. Financial Services will retain all original receipts. Individuals should keep copies of receipts for warranty, income tax or other purposes.
12. Reimbursement of expenses under this plan is subject to acceptance of the plan by Canada Revenue Agency (CRA) as a non-taxable benefit. Therefore, all goods purchased under this plan are considered to be property of The University of Western Ontario.

**PROFESSIONAL DEVELOPMENT PLAN
PROFESSIONAL MANAGERIAL ASSOCIATION
FOR JAN. 1, 2009 – DEC. 31, 2011
SEE INSTRUCTIONS ON REVERSE**



Western

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

CONTROL#

PM11

VENDOR #

9

Y Y M M D D

UWO EMPLOYEE NUMBER

SURNAME (Please print legibly)

GIVEN NAME

FACULTY/SCHOOL//DEPARTMENT (or off-campus address)

PHONE NUMBER

EXTENSION

ROOM NUMBER - BUILDING (or off-campus address)

E-MAIL

MAXIMUM REIMBURSEMENT (see Note 2 over)

CITY

POSTAL CODE

Expense Category	Name of Professional Association/Supplier	Receipt Total	Deduct Personal/ Previously Claimed	Currency & Exchange	Claim Amount
Membership/ Registration Fees					
Equipment (See note 6 over)					
Computer Software					
Travel Expenses (State PD purpose)					
Supplies (including – subscriptions, reprints, Internet and books)					

**ORIGINAL receipts must be attached. Maximum 2 claims per year.
Send completed form to Financial Services, Suite 6100,
Support Services Building. **FILING DEADLINE IS MARCH 31, 2012.****

DO NOT WRITE IN SHADED AREAS

Total \$

	SPEED CODE	ACCOUNT	TOTAL	PST	GST
Membership/ Registration Fees	PBM3	631400			
Equipment	PBM3	605400			
Computer Software	PBM3	621250			
Travel Expenses	PBM3	645000			
Supplies	PBM3	622000			
TOTAL			\$		

SIGNATURE OF CLAIMANT

SIGNATURE OF SUPERVISOR