2016 PROFESSIONAL MANAGERIAL ASSOCIATION
PROFESSIONAL EXPENSE REIMBURSEMENT
INSTRUCTIONS FOR COMPLETING CLAIM FORM

Note: PER claims may be submitted online. For assistance, please see the step by step instructions or view a how-to video.

Type or print legibly. Shaded areas are for Financial Services use.

1. For 2016 you were provided with flexible credits (Flex Credits) of $1,200. In November 2015, you were given the option to allocate these credits to your Professional Expense Reimbursement (PER) account and/or to your Health Care Spending Account (HCSA) in $100.00 increments. Please note: If you did not make an election, the entire $1,200 in credits by default was automatically allocated to your PER.

A link to full details on your Flex Credits, PER and HCSA options can be found on the Western Human Resources website under Benefits and Pay – Your Benefits. An FAQ is also available.

2. To see the 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 Western user ID and password work here. Choose "Employee Self-Service", then "PER Entitlement and Past Claims". 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.

3. Members who have accumulated unused allocations up to December 31, 2014, may use those accumulated funds against expenses incurred in 2014 or 2015 only. Receipts for claims using 2014 accumulations must be submitted by March 31, 2016. Thereafter, any remaining accumulation from 2014 and prior will be forfeited.

4. Unspent PER allocations from 2015 may be carried forward into 2016 and 2017, but not beyond. In all subsequent years, a similar two year carry forward of allocations will apply, regardless of the PMA agreement expiry date. Be aware that while the credits may be carried forward, claims for any given year must be submitted by March 31st of the following year.

5. PMA-eligible members may make up to two submissions per year.

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, then reviewed and signed by his/her supervisor. This reimbursement must relate to expenses incurred during the course of employment at Western and assist PMA staff in their professional development. Forward all forms and receipts to Financial Services, Suite 6100, Support Services Building.

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. 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.

9. 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 and equipment related to the staff member’s work; See Note 11.
   - Travel expenses related to professional development (transportation, accommodation, meals);
   - Subscriptions – (excluding newspapers), journals, books related directly to the individual’s role at Western;
   - Supplies (related to the staff member’s work) – ink cartridges, course textbooks, Internet access, etc.;

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 Western. Equipment is not eligible within 12 months of retirement.

11. Financial Services will retain all original receipts. Individuals should keep copies of receipts for warranty, income tax or other purposes.

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.
PER claims may be submitted online. For assistance, please see the step by step instructions or view a how-to video.
(Do not use this form if you will be submitting your claim online)

CONTROL#  VENDOR #  Y Y M M D D
PM16  9  [ ] [ ] [ ] [ ] [ ]

SURNAME (Please Print)  GIVEN NAME

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

ROOM NUMBER - BUILDING (or off-campus address)

CITY  POSTAL CODE

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<tr>
<th>Expense Category</th>
<th>Name of Professional Association/Supplier</th>
<th>Receipt Total</th>
<th>Deduct Personal/Previously Claimed</th>
<th>Currency &amp; Exchange</th>
<th>Claim Amount</th>
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<td>Membership/Registration Fees</td>
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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, 2017.

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  $  $  $

SIGNATURE OF CLAIMANT  SIGNATURE OF SUPERVISOR