

**2011
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 Professional Expense Reimbursement (PER) is \$1,300.00 for 2011. **The base amount of the PER for 2011 is \$400.00. By election, in November 2010 for 2011, additional flexible credits up to \$900.00 can be allocated to the PER in \$100.00 increments. If you did not make an election, \$700.00 in flexible credits were automatically allocated to your PER and \$200 to your HCSA.** To verify your individual allocation of flexible credits to your PER, sign on to myHumanResources (http://www.uwo.ca/humanresources/peoplesoft/admin_index.htm) and select "Benefits". There is full carry forward of any unspent amounts for the period January 1, 2011 to December 31, 2011 to a subsequent year during the term of the Collective Agreement but not beyond. **Receipts for the 2011 allocation year may be dated up to March 31, 2012.** Members may submit claims during the period January 1 to March 31 each year for the prior calendar year. 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.

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.

3. 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.
4. 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. Receipts submitted must be dated within the eligible period of the claim (January 1, 2010 – March 31, 2012). **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.**
5. 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 6);
 - 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.
6. **To be eligible, equipment must be used primarily for work purposes. Furniture and upgrades to 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.**
7. 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.
8. 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, 2011 to MAR. 31, 2012
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, 2012.

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