

2010

LIBRARIANS AND ARCHIVISTS
PROFESSIONAL EXPENSE REIMBURSEMENT PLAN
INSTRUCTIONS FOR COMPLETING CLAIM FORM

1. Type or print legibly. Shaded areas are for Financial Services use.
2. The combined Professional Expense Reimbursement (PER) and Travel Expense Reimbursement (TER) for the 2009 calendar year is \$900 for full-time members and \$450 for part-time members. The base amount of the PER for 2010 is \$600.00. By election, in November, 2009 for 2010, additional flexible credits up to \$500.00 can be allocated to the PER in \$100.00 increments. Individuals may carry forward any unspent amount to March 31 of the last year of the collective agreement, but not beyond. Eligible members may make up to two submissions per year. All claims must be submitted no later than March 31, 2011. Members shall submit receipts during the period February 1 to March 31 each year for the prior calendar year. Eligible members may submit a claim 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 staff member, then reviewed and signed by his/her supervisor and submitted to the Office of the University Librarian or Dean. This reimbursement must relate to expenses incurred during the course of employment at The University of Western Ontario and assist Librarians and Archivists in their professional work.

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, 2009 – December 31, 2010). **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 staff members are eligible for reimbursement:

- membership fees for professional associations and/or learned societies related to the Member's professional role;
- subscriptions to professional, learned or industry-related periodicals;
- books, instruments, supplies, materials, computer software and hardware, the purchase or lease of equipment and services (see Note 6);
- page and reprint charges or costs incurred in the course of the Member's responsibilities;
- registration fees for the Member to attend professional or scholarly conferences, meetings, seminars or workshops;
- transportation, food and accommodation, according to the University travel policies, for the Member for professionally related activities; and
- academic regalia.

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.

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
LIBRARIANS AND ARCHIVISTS
FOR JAN. 1, 2009 – DEC. 31, 2010
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#

LA10

VENDOR #

9

Y Y M M D D

UWO EMPLOYEE NUMBER

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 over)

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 purpose)					
Supplies (including – subscriptions, reprints, Internet and books)					

ORIGINAL receipts must be attached.

Send completed form to Financial Services, Suite 6100, Support Services Building. **FILING DEADLINE IS MARCH 31, 2011.**

DO NOT WRITE IN SHADED AREAS

Total \$

	SPEED CODE	ACCOUNT	TOTAL	PST	GST
Membership/ Registration Fees	PBM9	631400			
Equipment	PBM9	605400			
Computer Software	PBM9	621250			
Travel Expenses	PBM9	645000			
Supplies	PBM9	622000			
TOTAL			\$		

SIGNATURES: CLAIMANT

SUPERVISOR

UNIVERSITY LIBRARIAN/DEAN