

2011
SELECT ADMINISTRATIVE GROUP EMPLOYEES (SAGE)
PROFESSIONAL DEVELOPMENT PLAN
INSTRUCTIONS FOR COMPLETING CLAIM FORM

1. Type or print legibly. Shaded areas are for Financial Services use.
2. The reimbursement will be either the maximum amount of \$300.00 or the total of actual expenditures, whichever is less. All claims must be sent to Financial Services, Suite 6100, Support Services Building by January 31 for the prior calendar year.

If your banking information is on file in the Human Resources system, payment will be made 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. This reimbursement must relate to expenses incurred during the course of employment at The University of Western Ontario and assist SAGE Members in their professional development.
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 (i.e. January 1, 2011 – December 31, 2011). There is no “carry-forward” of unspent balances from the previous year.

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:
 - Memberships in professional associations;
 - Registrations to conferences, course tuition;
 - Computer software (related to staff member’s work);
 - Travel expenses (transportation, accommodation, meals);
 - Subscriptions (excluding newspapers), journals, books and Internet access.

Equipment and computer hardware are not eligible.

6. Financial Services will retain all original receipts. SAGE members should keep copies for their own records. Expenses reimbursed under this plan may not be deducted for income tax purposes.
7. Reimbursement of expenses under this plan is subject to acceptance of the plan by Canada Revenue Agency 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
(SAGE ELIGIBLE STAFF)
FOR JAN. 1, 2011 – DEC. 31, 2011
SEE INSTRUCTIONS ON REVERSE**



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

CONTROL#

SA11

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 \$300.00

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

**ORIGINAL RECEIPTS MUST BE ATTACHED.
FILING DEADLINE IS JANUARY 31, 2012.**

DO NOT WRITE
IN SHADED
AREAS

Total \$

	SPEED CODE	ACCOUNT
Membership/ Registration Fees	PBM5	631400
Computer Software	PBM5	621250
Travel Expenses	PBM5	645000
Supplies	PBM5	622000

TOTAL

HST

TOTAL \$

SIGNATURE OF CLAIMANT

SIGNATURE OF SUPERVISOR