

Don Wright Faculty of Music Professional Expense Reimbursement (PER) Instructions

Last Updated: February 10, 2016

Articles in the Collective Agreement regarding PER:

Please familiarize yourself with the *Professional Expense Reimbursement* and *Compensation and Benefits* articles in the UWOFA Collective Agreement, which can be found at the following web link:

http://www.uwo.ca/facultyrelations/pdf/collective_agreements/faculty.pdf

How to check your PER account balance:

Please find step-by-step instructions below, or refer to the screenshots displayed on Page 2 of the *“Instructions on How to Submit a PER Online Claim”* document.

- Go to the Financial Services website at <http://www.uwo.ca/finance/> and select the *Western Financials Login* button;
- Login with your Western user ID and password;
- Once logged in, from the Main Menu (main screen), select *Employee Self Service*;
- Select *Prof Exp Reimbursement Centre*;
- Select *PER Entitlement & Past Claims*.

The *PER Entitlement & Past Claims* section will display any carry forward from the previous year, your entitlement for the current year, any claims you have made in the current year, as well as the current balance in your account.

What are Flex Credits? (FULL-TIME FACULTY ONLY):

UWOFA Full-Time Faculty Members are offered flexible benefit credits (aka Flex Credits), which you can allocate towards your PER account, your Health Care Spending Account (HSCA) or your Wellness Account. Tax rules stipulate that a decision about how much you allocate to each account must be made by November 30 of the year prior to the Calendar Year the account(s) will be utilized. Where a Member makes no allocation, a default allocation will be made on your behalf and may not be changed once the deadline has passed.

To learn more about Flex Credits, please refer to the *“Information on Flex Credits – 2016 Full-Time Faculty”* document or Clause 38 of the *Compensation and Benefits* article in the UWOFA Collective Agreement, which can be found at the following web link:

http://www.uwo.ca/facultyrelations/pdf/collective_agreements/faculty.pdf

How to check your Flex Credits account balance (FULL-TIME FACULTY ONLY):

Please find step-by-step instructions below regarding how to check your Flex Credits account balance.

- Go to the Human Resources website at <http://www.uwo.ca/hr/> and select the *My Human Resources* button (under Login Tools);
- Login with your Western user ID and password;
- Once logged in, under the My Human Resources section (main screen), select *Benefits*;
- Select *Benefits Summary*;
- Click on *Health Care Spending Account*.

The *Health Care Spending Account* section will display your Flex Credit Allocation for the current calendar year.

How to submit a PER claim:

A PER claim must be submitted, along with applicable receipts, in order to be reimbursed from your PER account. **The deadline to submit your PER claim for expenses incurred in 2015 is March 31, 2016.**

The deadline to submit your PER claim for expenses incurred in 2016 is March 31, 2017.

PER claims can be submitted one of two ways: 1) as an **Online Claim** through the Financial Services system; **OR**; 2) a **Paper Claim Form** submitted to the Financial Services office.

1) Online Claim process:

- Submitting an online claim is the quickest way to receive your PER reimbursement!
- Please refer to Pages 3-4 of the *“Instructions on How to Submit a PER Online Claim” document* for step-by-step instructions and screenshots for submitting an online claim, or watch the training video which can be found at the following web link:

http://www.uwo.ca/finance/training_reference/content/accounting/creating_per_claim/story.html
- Online claims can be submitted through the Financial Services website at <http://www.uwo.ca/finance/> (select the *Western Financials Login* button to login).
- A printed copy of your online claim and all applicable receipts must also be submitted to the Financial Services Office “Travel Desk”, in order for your PER reimbursement to be processed. Their office location/contact info can be found below under **Questions?**

2) Paper Claim Form process:

- Submitting a paper claim can take up to 2 weeks to be processed.
- Please use the Paper Claim Form, which can be found on Page 2 of the following documents:
 - **Full-Time Faculty Members:** *“PER Guidelines & Paper Claim Form – 2015 Full-Time Faculty”*

- **Part-Time Faculty Members:** *“PER Guidelines & Paper Claim Form – 2015 Part-Time Faculty”*
- Please attach all applicable receipts to your Paper Claim Form and have your Department Chair sign it.
- Your Paper Claim Form and all applicable receipts must be submitted to the Financial Services Office “Travel Desk”, in order for your PER reimbursement to be processed. Their office location/contact info can be found below under **Questions?**

Questions?

General questions about the PER process can be directed to Julia Lazarito in the Music Dean’s Office, at julia.lazarito@uwo.ca or (519) 661-2111, ext. 85361.

Specific questions about the Online Claim process (technical issues, etc.), your PER account balance and allocating Flex Credits can be directed to the Financial Services Office “Travel Desk”. This is also the same campus location where Paper Claim Forms should be submitted:

Financial Services Office - Travel Desk
Support Services Building – Room 6100
Phone: (519) 661-2111, ext. 85499
Email: travel@uwo.ca