

**2015 UWO FACULTY ASSOCIATION (FULL-TIME)
PROFESSIONAL EXPENSE REIMBURSEMENT
INSTRUCTIONS FOR COMPLETING CLAIM FORM**



Note: PER claims may be submitted online! See https://www.uwo.ca/finance/pplsoft/docs/PER_instructions.pdf.

1. Type or print legibly. The shaded areas are for Financial Services use.
2. The 2015 base Professional Expense Reimbursement (PER) amount for Full-Time Faculty Members is \$500. An additional \$900 in Flex Credits was also made available. In November 2014, 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 increments. If you did not make an election, by default, \$700 in flex credits were automatically allocated into your PER and \$200 to your HCSA.
Newly-hired Full-Time Members hired on or before July 1 will have access to 100% of the allocations for the calendar year. Full-time Members whose appointment begins after July 1 will have access to 50% of the allocations for that calendar year.
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.
3. 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 regular 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.
4. Unused allocations from 2015, 2016 and 2017 may be carried forward into any subsequent years up to March 31, 2018 but not beyond. 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. Thus, the deadline to submit calendar year 2014 expenses for reimbursement is March 31, 2015.
5. **The deadline to submit calendar year 2015 expenses for reimbursement is February 1 - March 31, 2016.** Eligible Full-Time Members may submit a claim for reimbursement at any time prior to February 1, 2016 as long as the claim for eligible expenses is greater than \$500. If a Member's eligible expenses exceed the amount available in a calendar year, the non-reimbursed portion of the expense may be claimed in a subsequent calendar year, up to March 31, 2018.
6. If your banking information is on file in the Human Resources system, your PER will be paid by direct deposit to your bank account.
7. 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 academic duties prior to approving the payment.
8. 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 purchased. In the case of Internet access, receipts from the start of the service in that calendar year and two subsequent receipts showing continuation of the service throughout the year, are required.
9. 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 10);
 - registration fees for the Member to attend scholarly conferences;
 - travel, including transportation, food and accommodation (subject to the University's 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.
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. 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 Western on the original receipt, photocopy the receipt for their records, and return the defaced original.
12. 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)
JAN 1, 2015 to DEC 31, 2015
SEE INSTRUCTIONS ON REVERSE**



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

To submit an online claim instead, visit

https://www.uwo.ca/finance/pplsoft/docs/PER_instructions.pdf (Do not use this form if you will be submitting your claim online)

CONTROL#

Z15

DATE

UWO EMPLOYEE NUMBER (MANDATORY)

SURNAME (Please Print)

GIVEN NAME

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

ROOM NUMBER - BUILDING (or off-campus address)

PHONE NUMBER

EXTENSION

E-MAIL

CITY

POSTAL CODE

**MAXIMUM REIMBURSEMENT
(See Note 2 over)**

| 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 10 over) | | | | |
| Travel Expenses (State purpose) | | | | |
| Supplies (including – subscriptions, reprints, Internet and books) | | | | |

**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, 2016.****

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