

**REIMBURSEMENT OF PROFESSIONAL DEVELOPMENT EXPENSES
(IN ACCORDANCE WITH AD 10-11)
INFORMATION SHEET**

PURPOSE:

The University encourages Employees to pursue Professional Development activities in order to remain at the forefront of their respective disciplines.

The University will reimburse the Employee for allowable Professional Development expenses that are not otherwise reimbursed by the University.

This reimbursement is in addition to funds normally made available by departments for Professional Development.

WHO IS ELIGIBLE?

A Continuing Employee whose start date falls between January 1 and September 30 is eligible to make a purchase and apply for a reimbursement on January 1 of the following year. A Continuing Employee whose start date falls between October 1 and December 31 of one year is not eligible to make a purchase and apply for reimbursement on January 1 of the year immediately following, but will be eligible on January 1 of the subsequent year.

The reimbursement available for Professional Development will be pro-rated based on normal hours worked for a Continuing Part-time Employee in a Continuing Position.

CLAIM PERIOD:

- You **may only claim** for expenses which you paid for in the current calendar year plus those from the prior calendar year.
 - Only **ONE** Professional Development expense statement for reimbursement may be submitted anytime in a calendar year.
 - **Please Note:** You can only claim for expenses incurred on or after your effective date of eligibility.
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SUBMISSION PERIOD – ONCE A CALENDAR YEAR BETWEEN JANUARY 1 AND DECEMBER 31.

Claim must arrive by December 31 to Human Resources to be eligible for that calendar year. Any claims arriving after December 31 will be processed in the next calendar year.

Please Note: Hardcopies are required, emailed claims will not be processed.

ANNUAL ENTITLEMENT AMOUNT AND BALANCE:

The amount of reimbursement available for Professional Development is:

effective January 2007 \$600 per calendar year;
effective January 2009 \$700 per calendar year.

Unused Professional Development funds in a calendar year may be carried forward to the next calendar year but in no case will a Continuing Employee's entitlement be greater than:

effective January 2007 \$1,800;
effective January 2009 \$2,100;
effective January 2014 \$2,800.

REQUIRED RECEIPTS:

All purchases must be supported by the **ORIGINAL proof of payment in your name** eg, itemized cash register receipt or invoice stamped paid in full. **Receipts must clearly identify the specific item(s) purchased and the total amount paid.** Order forms, photocopies, faxes, estimates and packing slips **are not** acceptable as an invoice or proof of payment. If receipt/invoice does not clearly state the total amount paid, it must be accompanied by proof of payment. Claims that do not have originals attached will be returned. Emailed copies will not be processed.

A copy of a credit card sales slip/statement on its own is not sufficient: employee must submit the invoice as well (eg. must provide restaurant receipt showing all charges being claimed, not just the debit/credit card receipt). All items purchased and method of payment must be clearly indicated on the statement.

****Small receipts must be taped to 8 ½ x 11 paper. Remember to white-out or black out credit card/account numbers and any line items that are not being claimed.** Claims that do not comply with this requirement will be returned.

If you are planning to resubmit a receipt to claim the difference in the next calendar year, you must request that the original be returned to you. On the top of both the PD Fund Expense Claim and the original receipt write, **“PLEASE RETURN ORIGINAL RECEIPT”**. This receipt will be stamped by Accounts Payable indicating the amount already paid from your PD Fund account. Copies of receipts **will not** be eligible for reimbursement.

ANNUAL ENTITLEMENT AMOUNT AND BALANCE:

- Before submitting a claim, check your current available balance online at mySFU. Your reimbursement claim cannot exceed your available balance.

ELIGIBLE PD FUND EXPENSES FOR REIMBURSEMENT

Expense	Eligible Items	What to Submit/Attach to Claim form
Computer	<ul style="list-style-type: none"> • Computer/Laptop/iPad or Tablet (1 item in this category every 3 years) • Hardware: any hardware upgrades/improvements are subject to the same time restrictions as purchasing a computer/laptop/iPad or Tablet (1 every 3 years) • Monitors over 27 inches are not eligible • Software (must be related to your area of employment or possible future employment at SFU) • Extended warranties (must be purchased with the computer) 	<ul style="list-style-type: none"> • Original itemized receipts confirming total amount paid and date paid <p>**3 Year Restriction: Applies to computer/laptop/iPad/Tablet or hardware Eligible to claim 1 item in this category every 3 years</p>
Conferences	<ul style="list-style-type: none"> • Conferences, workshops, seminars must relate to your area of employment or possible future employment at SFU • Can only be claimed after attendance at the event, even if the registration fee was paid in advance 	<ul style="list-style-type: none"> • Must include proof of conference attendance (i.e. name tag): a copy of the conference program/brochure, and registration confirmation detailing amount paid • For online registration: A copy of the completed registration and the email acknowledgement of payment received supported by copy of the credit card statement • For out of town conferences: All original boarding passes must be included as well as invoice/itinerary from the travel agency showing the fare details, itinerary and proof of payment

Journals/Books	<ul style="list-style-type: none"> Purchases must relate to your area of employment or possible future employment at SFU 	<ul style="list-style-type: none"> Itemized receipts must include name of each book claimed If books are purchased for a course, must provide proof of completion of the course
Membership Fees	<ul style="list-style-type: none"> Fees for memberships will be eligible if they relate to your employment or possible future employment at SFU 	<ul style="list-style-type: none"> Original receipt showing payment amount and date paid If renewed online: Attach a copy of the completed registration and the email acknowledgement of payment received supported by a copy of credit card statement
Airfare	<ul style="list-style-type: none"> Economy Class (only) All claims for airfare must be supported by all original boarding passes for every segment of travel This can only be claimed after attendance at the event, even if paid in advance 	<ul style="list-style-type: none"> All original boarding passes must be included as well as invoice/itinerary from the travel agency showing the fare details, itinerary and proof of amount paid For tickets purchased electronically: attach a copy of the e-ticket with fare details and itinerary and proof of amount paid

EMERGING TECHNOLOGY

The University will research new & emerging technology as it becomes available and will determine eligibility in accordance with Policy AD10-11.

Once a determination is made on eligibility, notification will be sent out to employees.

EXAMPLES OF ITEMS NOT ELIGIBLE FOR PD FUND REIMBURSEMENT

Business or first class travel	Office furniture and furnishings
Air travel cancellation insurance	Briefcases or luggage
Passport or visas	Big screen TV as PC monitor
Cell phones, Blackberries, iPhones and/or Data Plans	iPod, iTouch, MP3 Players, iPad Mini , e-readers
Gaming systems (ie. Wii), video games	Service cost for equipment
Toner cartridges, Laptop batteries or adapters	Digital camera, Video camera, Projector
ADDITIONAL Computer Peripherals: keyboard/mouse, memory sticks, external hard drives, Mac Airport, Time Capsule	

OWNERSHIP

The University owns equipment purchased with Professional Development Funds. If you retire or terminate employment prior to the fair market value equaling \$0 (as outlined in Policy AD10-11), you will have the option of purchasing these item(s) from the University at fair market value or declaring the item(s) as a taxable benefit at fair market value as at the date of such retirement or termination of employment.

If you require clarification on specific item(s) that would be eligible for professional development claims, please contact Cookie Purewal at 778-782-5662 or email at cpurewal@sfu.ca **prior to** making your purchase.