Please read instructions carefully to avoid having your claim sent back for corrections and/or missed items.

PDR claims will only be accepted electronically through FINS.

### Getting Started:

1. See the Faculty Relations website for details on eligible items. [http://www sfu.ca/faculty-relations/professional-development.html](http://www.sfu.ca/faculty-relations/professional-development.html)
2. Go to SFU Main page – click on Faculty & Staff (on the top bar) then scroll down (online services) under Financial Services click on:
3. PD Funds: to check your current available PDR balance (claim cannot exceed available balance)
4. Click on Travel & Expense claims FINS – and log in to access the online account (https://fins.sfu.ca/psp/fsprd/?cmd=login).
5. Go to Expense Management(on the left)-Expense RPT - create/modify to create your PDR claim
6. Create a new expense claim by selecting - Add
7. Once new expense claim is open, choose Business Purpose: PDR Claim-Faculty (very important)
8. Group all receipts by category; each conference / trip and related items together, books together, equipment together, etc. 
9. All receipts and related documents need to be scanned as a PDF and attached to claim. (preferably all in one attachment)
10. Please scan items in the same order they will be entered into FINS. All scanned items must be clear and legible.
11. Please make sure to add description of each expense and notes in "Reason for expense" to provide clarity of expense.

### What needs to be included with your claim:

- Scanned copy of original receipts and supporting documents (receipts provided must not be claimed elsewhere)
- Copy of any expense claim(s)/grant(s) for items reimbursed elsewhere that may be related to expense(s) being claimed on PDR
- Proof of payment/copy of credit card statement(s) for all non-Canadian charges paid by credit card (or enter the amounts in FINS)
- For all purchases made in non-Canadian (cash purchases), you may choose to use the currency converter in FINS or include a copy of the Oanda Currency Converter ([https://www.oanda.com/currency/converter/](https://www.oanda.com/currency/converter/)) for each item to confirm converted amount.

#### Conference(s), Workshop(s) - Please include all the following:

- Copy of program with name, dates and location of event
- Proof of attendance (name badge, program, etc.)
- Circle name in program, if presenter
- Copy of airfare itinerary or hotel receipt showing you went to location, even if not claiming on PDR

#### Research Trip(s) - Please include all the following:

- Dates and location of trip (can claim 14 days maximum)
- Detailed statement of how trip enhances/realted to your teaching/research at SFU
- Detailed account of who, where, when - include supporting documentation, email correspondence, invitations, etc.

#### Airfare:

- Itinerary showing flights and amount paid (quote or confirmation alone are not eligible)
- Invoice must show paid (proof of payment)
- Boarding passes for each flight
- If trip extended before or after conference dates, a quote for the airfare for the duration of the event is required.
  
  (To and from Vancouver for the dates of the conference/workshop location)

#### Home Internet:

- Claim flat rate of $45.00 per month. If your internet rate is less than $45.00, please claim actual amount paid.
- Select the number of months you wish to claim (eg. $45 x 12) and in the note section indicate the months being claimed (eg. Jan 2019 – Dec 2019)

  You can claim a full year of internet on your claim and if you retire or resign before the end of the year, you will need to pay back the internet expenses for the months when you were no longer employed at SFU.

- Copies of internet bills for each month are No longer required.
- Please provide One invoice only, to show details of internet. (keep all your internet invoices in case of an audit)
- PDR requires only original receipts, no duplicates. (invoices must not be claimed elsewhere)

Canada Revenue Agency stipulates that business use of home internet is not a taxable benefit, but any personal use is a taxable benefit. Therefore we can no longer provide 100% reimbursement for home internet expenses.

#### Computer / Printer:

- Chair/Director/Dean approval required - for purchases less than 3 years from previous purchase date, claimed on PDR. Must provide justification why another computer/printer is necessary for teaching/research at SFU prior to the 3 year policy.
- Definition of computer includes: desktop, laptop, tablet and iPad.

#### Camera, Special Equipment or Courses: (requires pre-approval for such items)

- Prior approval from Director, Faculty Relations with explanation and details needed to justify expense (Karim Dossa – kdossa@sfu.ca)
- Description of Special Equipment / Course / requesting approval. (explanation on how item is used for teaching/research at SFU)

All inquiries should be directed to Silvana De Benedetto at sdebened@sfu.ca or at 778-782-9715