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 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 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 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.
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.

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.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Eligible Items</th>
<th>What to Submit/Attach to Claim form</th>
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</table>
| Computer         | • Computer/Laptop (1 computer every 3 years)  
• Hardware: any hardware upgrades/improvements are subject to the same time restrictions as purchasing a computer/laptop (every 3 years)  
• Monitors over 24” 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) | • Original receipts confirming total amount paid and date paid                                     |
| Conferences      | • Conferences, workshops, seminars  
• Conferences, workshops and 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 | • Must include proof of conference attendance: a copy of the conference program/brochure, and conference 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 |
| Subscriptions, Journals, Books | • Purchases must relate to your area of employment or possible future employment at SFU | • A copy of the online renewal and confirmation of actual payment that shows amount and date paid  
• Itemized receipts must include name of each book claimed |
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

<table>
<thead>
<tr>
<th>Business or first class travel</th>
<th>Office furniture and furnishings</th>
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<tbody>
<tr>
<td>Air travel cancellation insurance</td>
<td>Briefcases or luggage</td>
</tr>
<tr>
<td>Passport or visas</td>
<td>Big screen TV as PC monitor</td>
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<tr>
<td>Cell phones, Blackberries, iPhones or Phone and/or Data Plans</td>
<td>iPod, iTouch, MP3 Players, iPad, e-readers</td>
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<tr>
<td>Gaming systems (ie. Wii), video games</td>
<td>Service cost for equipment</td>
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<tr>
<td>Toner cartridges, Laptop batteries or adapters</td>
<td>Digital camera, Video camera</td>
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<tr>
<td>Computer Peripherals: <strong>ADDITIONAL:</strong> keyboard/mouse, memory sticks</td>
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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.