SFUFA PROFESSIONAL DEVELOPMENT REIMBURSEMENT
2017 INFORMATION SHEET (UPDATED DEC 12/17)

PURPOSE:
As per Article 43.50-43.63 of the Collective Agreement, the purpose of the Professional Development Fund is to reimburse faculty members for eligible professional development expenses for activities to exclusively enhance an individual’s performance, ability or effectiveness as a teacher and a scholar at the University and which benefit the University.

Professional Development Reimbursement is a non-taxable benefit which can be audited by Canada Revenue Agency (CRA) at any time.

ELIGIBILITY:

- Continuing, full-time faculty and librarians/archivists
- Limited-term faculty and librarians/archivists with an initial appointment of more than one year.
- Part-time, recurring limited-term faculty and librarians/archivists who have SFUFA appointments totaling at least one year over a four year period.

Any Faculty member on an unpaid leave of absence or on long-term disability for an entire calendar year is not eligible for PDR that year.

CLAIM PERIOD:

Eligible SFUFA members can only submit ONE PDR claim PER YEAR. The last day to submit PDR claims for the 2017 year is by 4:30pm on Dec. 15, 2017. The claim must be submitted in FINS on this day - NO CLAIMS WILL BE ACCEPTED after Dec. 15, 2017.

- Paid expenses can only be claimed for the current and immediate prior calendar year. For example, 2017 claims can include eligible expenses dated and paid for between Jan. 1, 2016 up to Dec. 15, 2017.
- Only expenses incurred after the start of an appointment at SFU can be claimed.
- All items must be paid for and received, conferences attended and travel concluded before a claim can be reimbursed.

Exception on Retirement and Resignation: If you plan to retire or resign, you must submit your final PDR claim to Faculty Relations at least one month prior to the appointment end date. All PDR claim and appropriate receipts must be submitted in FINS by no later than the date of your resignation or retirement. No claims submitted after this date, irrespective of when the expenses were incurred, will be accepted.
Please note: those who retire or resign can only claim eligible PDR expenses incurred to enhance their performance or ability as a teacher or scholar while at the University. Recent purchase(s) must include a justification. (See the Ownership section on page 2 of this document).

**ANNUAL ENTITLEMENT AND BALANCE:**

- Check your current available balance at MySFU: (my.sfu.ca) before submitting your claim. **Claims cannot exceed available balance.**

- The annual entitlement for Continuing, full-time faculty and librarians/archivists is $1,910.00.

- The annual entitlement for full-time Limited-term faculty and librarians/archivists with an initial appointment of more than one year is $1,910.00, pro-rated based on start date.

- The annual entitlement for part-time, recurring limited-term faculty and librarians/archivists who have held SFUFA appointments totaling at least one year over a four year period is pro-rated (see Article 43.54). For questions regarding the pro-rated amount, please contact Karim Dossa at karim_dossa@sfu.ca.

- Balances in a member’s professional development entitlement account at the end of each calendar year will be carried forward to the next calendar year. **A maximum of 4 years’ entitlement may be accumulated in this manner.**

- Claims **cannot exceed your current PDR balance. We do not reimburse amounts in excess of your available balance,** nor do we keep “extra” receipts for future reimbursement.

- Eligible PDR expenses reimbursed by research grants or any other funds cannot be re-claimed as Professional Development expenses.

- Items purchased for someone else cannot be claimed using your Professional Development Expense.

**OWNERSHIP:**

- **THE UNIVERSITY OWNS EQUIPMENT PURCHASED WITH PDR FUNDS**

  Article 43.62 states: “As non-taxable benefits, all goods purchased through the Professional Development Expense Account remain the property of the University. After three calendar years from the date of purchase, the member has the option of purchasing these items from the University at fair market value. If the member retires, resigns or is terminated as an employee of the University prior to the expiration of this three year period, the member will have the option of purchasing these items from the University at fair market value as at the date of such retirement or termination of employment.”

  When you leave the university (retirement/resignation/limited-term SFUFA contract not renewed), you have **3 choices** regarding equipment purchased within 3 years of your end date using PDR funds:

  **Choice 1:** Leave equipment with Faculty Relations.

  **Choice 2:** Keep the equipment and reimburse the University at Fair Market Value, information found at: [http://www.sfu.ca/faculty-relations/professional-development.html](http://www.sfu.ca/faculty-relations/professional-development.html)
Choice 3: Keep the equipment and declare it as a taxable benefit at Fair Market Value contact Silvana De Benedetto, silvana_de_benedetto@sfu.ca).

- Purchases of equipment within three years of retirement must be pre-approved by Director/Chairs or Dean and a copy of this approval must be included with your PDR claim.

**RECEIPT REQUIREMENT:**

- All purchases must be supported by scanned copy of the RECEIPT in your name. All receipts must clear and legible and identify the specific item(s) purchased and the total amount paid. **Order forms, estimates, packing slips are not acceptable.** If receipt/invoice does not clearly state the total amount was paid, it must be accompanied by proof of payment.

- **Charges without accompanying receipt details will not be reimbursed.** A copy of a debit/credit card sales slip/statement on its own is not sufficient. All items purchased and method of payment must be clearly indicated on the statement and must be in English (or translated into English).

- **All receipts must scanned in PDF form and attached to the travel and expense claim in FINS or your claim will be returned.**

- Credit card/account numbers must not be legible (for security reasons).

**For expenses paid for in currency other than Canadian $:**

1. **If you paid in non-$Cdn cash:** Please use the currency converter in FINS or Oanda Currency Converter at: https://www.oanda.com/.
   
   Input the date that matches the transaction date on the receipt, the amount and press the convert button. Record the equivalent Canadian amount on your expense claim, print the conversion page and attach a PDF scan to the claim with the relevant receipt. If the transaction date is a bank holiday, please use the next available date.

2. **If you paid by $Cdn credit card:** claim the Canadian amount from your credit card statement, and include a copy of the credit card statement as proof.

3. **If you paid by non-$Cdn credit card:** include a copy of the credit card statement showing date of payment, and complete the following using the currency converter in FINS or Oanda Currency Converter at: https://www.oanda.com/.
   
   Input the date that matches the transaction date on the receipt, the amount and press the convert button. Record the equivalent Canadian amount on your expense claim, print the conversion page and attach a PDF scan to the claim with the relevant receipt.

- PDR reimbursement is directly deposited into the bank account on record for payroll purposes.

**Steps to Complete PDR Claim:**

- Create a travel and expense claim, located in FINS – go to MySFU travel and expenses or https://fins.sfu.ca/psp/fsprd/?cmd=login

- Go to MySFU (my.sfu.ca) and check your PDR current available balance.
- **Group expenses by category as they will be entered in FINS.** Include expense details, including book titles, conference name, dates, etc.

- All receipts must be scanned in PDF form and attached to expense claim

- Be sure to use the correct expense type in FINS

- **Incomplete claims or claims with missing items will be sent back to the claimant.** Faculty Relations will no longer be able to make corrections for you.

- Keep all receipts and related documents in case of a CRA audit.

- Any queries, please contact Silvana De Benedetto at: silvana_de_benedetto@sfu.ca or 778-782-9715.

<table>
<thead>
<tr>
<th>Eligible Expenses</th>
<th>Requirements and Details</th>
<th>Ineligible Expenses</th>
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<tbody>
<tr>
<td>Books</td>
<td>Books must directly relate to your teaching/research: include explanation if needed.</td>
<td>No books paid with discount cards (eg. Chapters iRewards, Coles) or gift certificates</td>
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<td></td>
<td>Original invoice received with book is required. Itemized cash register receipts must include name of each book title being claimed and proof of amount paid. A credit card/debit statement alone is not sufficient.</td>
<td>No travel guide books</td>
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<td></td>
<td>Book(s) must have been received before you can claim on PDR.</td>
<td>No import, customs and duty fees</td>
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<td></td>
<td>Book(s) purchased in non-Cdn funds (eg. Amazon.com) must include copy of credit card statement.</td>
<td>No items purchased for others (eg. students or TA)</td>
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<td></td>
<td>Book(s) claimed must have been paid for by you and not by royalties or anyone else.</td>
<td>No book(s) authored by you, purchased as gifts</td>
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<td></td>
<td>Can only claim one same book title</td>
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<tr>
<td>Newspaper &amp; Journal Subscription</td>
<td>Scholarly journals and publications fees/subscriptions should be mailed to an SFU address (as this demonstrates professional use).</td>
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<td></td>
<td>Newspaper/journal subscription must include invoice/bill for each month and proof of payment.</td>
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| Membership Fees & Professional Dues (use Membership Dues expense type) | • Fees for membership in scholarly and licensing bodies or organizations directly related to your teaching/research at SFU.  
• **Must include scanned copy of original receipt**, detailing charges, amount and date paid.  
• If email order is only receipt received, please indicate in claim that was the only receipt received.  
• **Dues paid in non-Cdn $** must include a copy of credit card statement. | • No lifetime membership fees  
• No voluntary contributions or donations  
• No "Who’s Who" organization/network (eg. Continental Who’s Who Registry)  
• No insurance fees |
| Conference, Workshop & Seminar Registration Fees (Use Conference Registration Fees expense type) | • Conference or event registration confirmation, detailing amount paid and date paid must be submitted with PDR claim.  
• **Must also include proof of conference and event attendance** - eg. copy of pages or cover from conference program/booklet and original name tag received when checked into the conference which show dates & location of conference plus any pages where your name may be mentioned. Certificate of Attendance from conference organizers also acceptable.  
• **Expenses can only be claimed after attendance at the event**, even if the registration fee was paid in a previous year.  
• For invited talk/lecture, please include copy of invitation and talk/lecture with your PDR claim.  
• If any conference-related expenses were claimed elsewhere, PDR claim must include copy of the expense claim/grant where the other conference expenses were claimed. | • No non-credit courses at SFU or courses from other institutions (should be paid by department under Tuition Reimbursement policy).  
• No conferences fees for graduate student or others |
| Research Trip: (use expense type of item you are claiming and details in description box - eg. Accommodations, airfare, meals, etc.) | • Trip must enhance your teaching/research while at SFU.  
• **Claims must include a statement detailing your trip**; who you were meeting with, where, on what dates, how trip is related to teaching/research at SFU, documentation of any invitation to visit (eg. email(s) or documentation from colleague(s) inviting you there as well as email from them confirming that you were there working on the dates claimed. | • No expenses for research collaborators or anyone else.  
• Can claim a maximum of 2 weeks for accommodation, transportation and meal expenses. |
| Airfare (use Transportation – Airfare expense type) | ◆ Travel must be at the most reasonable economy class rate.  
◆ PDR only reimburses return airfare from Vancouver to conference/event/research trip location and for duration of conference/event/research trip only: if your airfare includes non-conference/event/research trip travel, your PDR claim must include a quote for cost of return airfare Vancouver to conference/event/research trip location coinciding with dates of conference/event/research trip: must get quote before you leave. You will be reimbursed for lesser amount. (eg. conference in London, England and personal travel afterwards to Paris: PDR only reimburses Vancouver to London return for conference dates.  
◆ Claims for airfare must be supported by original boarding passes for each segment of travel. | ◆ No Business or First Class travel  
◆ No cancellation fee  
◆ No airfare change fees  
◆ No excess baggage fees  
◆ No upgrade fees for seating/leg room  
◆ No luggage Porter fees  
◆ No travel insurance, medical costs or prescriptions  
◆ No passport or passport photo  
◆ No travel Visa fees |
| --- | --- | --- |
| Hotel/Transportation (use Accommodation – Hotel/Lodging expense type and Transportation type: taxi, parking, train, car rental, etc.) | ◆ Economy hotel costs for faculty member only: can claim 1 night before start of conference/event, duration of conference/event and last night of the conference/event.  
◆ Original hotel receipt showing total amount and date paid  
◆ Expenses can only be Reimbursed after the date of the conference/event.  
◆ If claiming economy car rental, eligible for duration of conference/event only.  
◆ If claiming taxi fare, must include original taxi receipt, copy of credit card statement is not sufficient.  
◆ Taxi fare to/from Vancouver/Abbotsford airport for travel to conference/event attendance is eligible.  
◆ Vancouver/Abbotsford airport parking for duration of conference/event attendance is eligible.  
◆ Hospitality of $35 Cdn/night (if applicable) | ◆ No local hotel in Lower Mainland  
◆ No resort fees  
◆ No room service, alcohol, mini bar, movies and tips/gratuities  
◆ No fitness centre/ health club fees  
◆ No hotel internet  
◆ No hotel telephone charges  
◆ No room upgrade  
◆ No laundry service  
◆ No hotel safe/locker charges  
◆ No pet charges  
◆ No car rental insurance  
◆ No mileage for car rentals  
◆ No tips/gratuities  
◆ No local travel costs (mileage, taxi, bus, train) to meetings, conference or event in Lower Mainland  
◆ No international driver’s license fees  
◆ No fines for traffic violations  
◆ No local parking unless attending conference/event  

*If claiming mileage (your car only) $0.51 per kilometer (1 mile=1.61 km)*
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<tr>
<th>Meals</th>
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<tr>
<td>If claiming meals per diem, the onus rests with the faculty member to present receipts in the event of a Canada Revenue Agency audit.</td>
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<tr>
<td>If claiming food per diem, do not claim hotel/restaurant meal charges.</td>
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<tr>
<td>Original detailed receipts required or per diem. A credit card/debit slip alone is not sufficient.</td>
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<tr>
<td><strong>Per diem Canada $Cdn:</strong> Breakfast $13 Cdn Lunch $15 Cdn Dinner $29 Cdn Total: $57 Cdn/day</td>
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<tr>
<td><strong>Per diem USA $Cdn:</strong> Breakfast $16 Cdn Lunch $18 Cdn Dinner $34 Cdn Total: $68 Cdn/day</td>
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<tr>
<td><strong>Per diem Rest of World $Cdn:</strong> Breakfast $13 Cdn Lunch $17 Cdn Dinner $33 Cdn Total: $63 Cdn/day</td>
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<th>Computer</th>
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<td>Computer and warranty purchased together and used for the purpose of research and/or teaching at SFU is eligible.</td>
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<tr>
<td>Definition of computer includes: desktop, laptop, tablet and iPad.</td>
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<tr>
<td>1 computer every 3 years from date of purchase. A second computer PDR reimbursement request in less than 3 years from the date of previous purchase requires justification and pre-approval of Chair, Director or Dean.</td>
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<tr>
<td>Original receipt required confirming total amount and date paid.</td>
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<tr>
<td>Maximum 27” Monitors. One monitor every 3 years from date of previous purchase.</td>
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- No meal expenses for other individuals.  
- No local meals eligible for PDR, only if during local conference/event.  
- No per diem can be claimed for local conference/event only meals with original receipts.  
- No alcoholic beverages.  
- No hotel room service.  
- No tips/gratuities.  
- No charges related to departmental hiring process (eg. meal with candidate).  
- No food /snacks of any kind for meetings or presentations.  

Can claim meals 1 day before start of conference/event, duration of conference/event and one day after the conference/event based on arrival/departure.

- Computer cannot be used for laboratory, research team/assistants or students.  
- No computer repair, service or labour.  
- **No optional computer accessories** such as but not exclusive to: computer bag, briefcase, luggage, stand, cover, keyboard cover, screen protector, stylus pen, docking station, port replicator, lock, trackpad, computer standing desk, Lightning cables.  
- No online backup storage/fees (eg. Mozy, SugarSync, Dropbox, Zotero).  
- No accessories for Tablets/iPads/Laptops (eg. mouse, keyboard cover, extra monitor, etc.).  

Hardware purchased within 3 years of retirement or contract end date must include pre-approval from Chair, Director or Dean. Attach scan of approval along with receipt to claim.
### Other Equipment
**(use Equipment – Purchase expense type)**

- Research or teaching equipment directly related to your teaching responsibilities and/or current active research.
- Original receipts required confirming total amount and date paid.

One same equipment piece every 3 years from date of purchase. (eg. one printer every 3 years from date of purchase).

*Equipment purchased within 3 years of retirement or contract end date must include pre-approval from Chair, Director or Dean. Attach scan of approval along with receipt to claim.*

- Equipment cannot be used for laboratory, research team/assistants or students
- No audio/stereo cables
- No SD memory card(s)
- No headphones/ headsets
- No webcam
- No lapel mics and microphones
- No speakers
- No TV used as computer monitor
- No TV service or repair
- No El Gato HD TV tuner
- No PVR/DVR machine
- No Apple TV
- No Gaming systems or games (eg. Wii and PlayStation)
- No DVD player
- No cell phones, phone accessories, data plans or telephone use (eg. Skype, Softel)
- No equipment repairs

### Home Internet Charges
***(use Office – Internet expense type)***

- Flat Rate of $45.00 per month for internet charges at home in Vancouver/Lower Mainland only. **If internet rate is lower than $45.00,** please claim actual amount paid.

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.

- Select the number of months for which you are claiming and enter $45. In the notes section, please indicate the months you wish to claim. You may claim for the full year of internet ($45 x 12) on one claim and if you retire or resign before the end of the year you will pay back the internet expense for the months when you were no longer employed at SFU.

- You will no longer have to submit monthly documentation for the claim (you should retain your home internet invoices in case you are audited)

- No web-hosting fees
- No home internet connectivity, Ethernet or networking cables
- No Internet charges outside of your home (eg. Rocket stick wireless charges)
- No routers of any kind (eg. Time Capsule or Airport Express Station)
- No modems

### Digital Camera
***(use Equipment – Purchase expense type)***

- Prior approval is required from the Director of Faculty Relations: catherine_stoddard@sfu.ca

Approval will be given only if is deemed to

- Camera cannot be used for laboratory, research team/assistants or students
| Digital Camera (cont.) (use Equipment – Purchase expense type) | enhance current teaching and/or research. A request for pre-approval should include written explanation detailing how the equipment is related to your discipline and how it enhances current teaching and/or research.  
◆ If approved, attach scan of original receipt along with copy of approval from Faculty Relations. | ◆ No optional camera accessories such as but not exclusive to: camera bags, lens, stands, chargers, batteries, etc.  
◆ No cost of repairs, service or labour  
Cost of extended warranty is eligible as long as purchased at the same time as camera. |
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<tr>
<td>Software (use Office – Software Purchase expense type)</td>
<td>◆ Software must be necessary for your teaching/research at SFU.</td>
<td>◆ No project, time, task management software (eg. Curio, Deskstastic, Deskscribble, SyncBack Pro, Dongle, etc.)</td>
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</table>
| Other Supplies & Fees (use Office – Supplies, Office - Postage/Courier or Office – Print/Copy/Fax expense types) | ◆ Office supplies must directly relate to your area of teaching and/or research  
◆ Itemized cash register receipts must include each supply being claimed and proof of amount paid. A credit card statement alone is not sufficient for PDR reimbursement. | ◆ No office supplies for others  
◆ No excessive expenses on office supplies  
◆ No office furniture, furnishings or desks of any kinds  
◆ No paper shredder  
◆ No file cabinets  
◆ No PhD/Master’s course fees  
◆ No expenses related to Dissertation/thesis defense (eg. copying, binding, postage, courier, or fax)  
◆ No cleaning supplies  
◆ No salaries/honorariums for self or others  
◆ No charges for department/office keys  
◆ No third party work, services, expenses or payment to/for other individuals  
◆ No payments for third party services such as editing, transcribing, proofing, research assistance, web design, computer repairs, Professional Coaching, tutoring, etc.  
◆ No Childcare  
◆ No attendance at Dissertation/thesis examination  
◆ No housing, food, local transportation or internet while away  
◆ No expenses incurred while temporarily residing in a place other than your own home  
◆ No office, room or studio rentals  
◆ No standing mats  
◆ No standing desks  
◆ No decorations for events/meetings |
| Convocation Gown (use Special Departmental Misc. Expense type) | ◆ Convocation attire purchased.  
◆ Original receipt required and proof of amount paid. | ◆ No optional accessories (eg. garment bag or hanger |