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

The following has been updated to reflect temporary changes during the COVID-19 Pandemic. Changes are indicated in red font and are effective from March 16, 2020 until December 31, 2020.

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.

Updated Oct 2, 2020
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.

ANNUAL ENTITLEMENT AMOUNT AND BALANCE:

The amount of reimbursement available for Professional Development is:
  o effective January 2007 $600 per calendar year
  o 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:
  o effective January 2007 $1,800
  o effective January 2009 $2,100
  o effective January 2014 $2,800
  o effective January 2016 $3,500

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

REQUIRED RECEIPTS:

Completed forms and receipts can be emailed to cpurewal@sfu.ca. Receipts can be scanned or photographed and included as attachments.

Receipts must clearly identify the specific item(s) purchased and the total amount paid. Order forms, 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.

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.
<table>
<thead>
<tr>
<th>Expense</th>
<th>Eligible Items</th>
<th>What to Submit/Attach to Claim form</th>
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</thead>
<tbody>
<tr>
<td>Computer</td>
<td>• Computer/Laptop/iPad or Tablet (1 item in this category every 3 years) • Computer peripherals including: headsets, microphones, noise cancelling headphones, webcams (for video for online sessions), keyboard, mouse, ergonomic keyboard/mouse, additional monitors up to 27 inches. • 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 32 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)</td>
<td>• Itemized receipts confirming total amount paid and date paid • **3 Year Restriction: Applies to computer/laptop/iPad/Tablet or hardware • Eligible to claim 1 item in this category every 3 years</td>
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<tr>
<td>Journals/Books</td>
<td>Membership Fees</td>
<td>Airfare</td>
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<tr>
<td>- Purchases must relate to your area of employment or possible future employment at SFU</td>
<td>- Fees for memberships will be eligible if they relate to your employment or possible future employment at SFU</td>
<td>- EconomyClass (only)</td>
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<td>- All claims for airfare must be supported by all original boarding passes for every segment of travel</td>
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<td>- This can only be claimed after attendance at the event, even if paid in advance</td>
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<td>- Original receipt showing payment amount and date paid</td>
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<td>- 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</td>
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<td>- 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</td>
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<td>- For tickets purchased electronically: attach a copy of the e-ticket with fare details and itinerary and proof of amount paid</td>
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</tbody>
</table>

**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
- Air travel cancellation insurance
- Passport or visas
- Cell phones, Blackberries, iPhones and/or Data Plans
- Office furniture and furnishings
- Briefcases or luggage
- Big screen TV as PC monitor
- iPod, iTouch, MP3 Players, IPad Mini, e-reader

Updated Oct 2, 2020
- Gaming systems (ie. Wii), video games
- Toner cartridges, Laptop batteries or adapters
- **ADDITIONAL Computer Peripherals:** memory sticks, external hard drives, Mac Airport, Time Capsule
- Service cost for equipment
- Digital camera, Projector

**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.