

Frequently Asked Questions Faculty Professional Expense Reimbursement

Q: What are the Professional Expense Reimbursement (PER) amounts available to Members of the faculty bargaining unit under the new Collective Agreement?

A: The PER amount available to Full-Time Members is \$1,100 for 2006, \$1,300 for the calendar year 2007 and \$900 in each of calendar years 2008 and 2009. Full-Time Members will have the option of allocating up to \$400 of their flexible benefit credits for each of the calendar years 2008 and 2009 to their PER and/or Health Care Spending Account (HCSA). (The election must be made by November 30 of each year for the following calendar year. Where a Member makes no election, \$200 of the Member's flexible benefit credits will automatically be placed in the Member's PER.)

The PER amount available to Part-Time Members in each year from 2006 through 2009 is \$200 for the first full-course equivalent taught in a calendar year (i.e. January to December), and \$67 for each additional half course, to a maximum of \$602 per calendar year. In order to be eligible to submit a claim for professional expenses for 2009, you must have taught a minimum of one full-course equivalent during the 2009 calendar year, and have been a Member of the faculty bargaining unit when you did so.

The PER amount for 2010 will be negotiated in the next Collective Agreement.

Q: What are eligible expenses?

A: According to clause 5 of the Professional Expense Reimbursement article in the new Collective Agreement, claims may be submitted for reimbursement of the following expenses, incurred in the course of employment:

- membership fees for professional and/or learned societies related to the Member's discipline;
- subscriptions to professional and/or learned journals;
- books, instruments, supplies, materials, computer software, the purchase or lease of equipment or services. In the case of purchase or lease of equipment the reimbursement must constitute the full purchase or lease cost without contribution by the Member;
- registration fees for the Member to attend a scholarly conference;
- travel, including transportation, food and accommodation (subject to the Employer's travel policies) for the Member to attend professionally related courses, conferences, meetings, seminars or workshops and to visit other universities or research sites to conduct Research and scholarly work that cannot be carried out at the Employer's workplace; and
- page and reprint charges or costs incurred in the preparation and completion of scholarly manuscripts.

Items that are primarily for personal use are not eligible. In the year of resignation or retirement, only items that are consumed prior to end of employment (e.g. supplies or Internet access) are eligible. All equipment remains the property of the University of Western Ontario and should be left at the University on resignation or retirement.

Q: How do Part-Time Members who teach in more than one Unit claim their reimbursement?

A: The PER form should be submitted to the Chair/Director/Dean of one Department/School/Faculty in which such Members teach. Finance will be responsible for confirming the total number of courses taught to calculate the reimbursement available.

Q: When can Members submit receipts for reimbursement?

A: The normal submission period for claims for expenses incurred in the previous year is February 1 through March 31. Claims may be made at other times during the year provided that the reimbursement amount is at least \$500.

Q: Can unused amounts be carried forward from year to year?

A: All PER amounts available under this Collective Agreement for 2006, 2007, 2008, and 2009 can be carried forward up to March 31, 2010. Any PER funds available to you under this Collective Agreement must be claimed and expenses can be incurred up to March 31, 2010. As an extreme example, you could use all of the amounts available to you from 2006, 2007, 2008 and 2009 for expenditures made in March 2010.

Q: Can receipts from an earlier year covered under this Collective Agreement be claimed in subsequent years?

A: Yes, for instance you could submit in 2009 receipts from 2008 for which funds were not available, provided that you have sufficient funds available in your 2009 PER to cover them. However, you cannot submit receipts for reimbursement for expenses from years (such as 2005) covered under a different Collective Agreement.

Q: How do Members apply for reimbursement?

A: For 2006, 2007, 2008 and 2009 claims they can download the appropriate PER form from: [UWO Financial Services Forms => <http://www.uwo.ca/finance/forms/index.html>].

Q: When do Members have to decide how much, if any, of their flexible benefit credits they want to allocate to their PER and/or HCSA?

A: The decision to transfer up to \$400 (in \$100 increments) of your flexible benefit credits into your PER and/or HCSA for the calendar year 2010 will have to be made by November 30, 2009.

Q: Can Members submit receipts that total more than the PER funds available to them?

A: For equipment, the answer is no. For other types of expenses, the answer is yes, however the reimbursement is capped at the funds available in the Member's PER.

For the purchase of eligible equipment, the reimbursement must cover the entire cost, with no contribution from the faculty Member. In other words, equipment receipts can only be submitted when there are sufficient funds in the Member's PER account to cover the full cost.

However, receipts for other eligible expenses can total more than the maximum allowable claim. If the Member wishes to have such receipts returned for another purpose, Financial Services will mark the amount that was reimbursed by UWO on the original receipt, make a copy for their records, and returned the defaced original receipt to the faculty Member.

Q: What happens to PER entitlements when a faculty Member is on sabbatical leave or Short or Long Term Disability?

A: There is no reduction to PER for Members on sabbatical leave or Short or Long Term Disability.

Q: Do new full-time faculty hired on July 1, 2009 have access to PER for 2009?

A: Newly-hired full-time faculty have access to the annual PER for the calendar year in which the appointment begins, provided they have at least six months service during that calendar year. Members hired after July 1, but before November 1, have access to one-half of the annual PER for that year. Nonetheless, eligible expenses would be those associated with their employment at Western, so receipts should date from the beginning of their appointment at Western. (A case could be made, however, that annual memberships in professional societies that come due earlier in the year are still associated with their employment at Western.)

Q: I took early retirement on June 29, 2009 in order to access my pre-1987 pension contributions. Am I eligible for PER?

A: As long as you were a Full-Time Member in January 2009 and eligible for the full amount of PER, you are eligible for the 2009 allocation for expenses incurred prior to July 1, 2009.

Q: I was a Member from January to June and then became an Associate Dean thereby being excluded from the Bargaining Unit. Am I eligible for PER and, if so, what amount? Will I get the annual entitlement when I return to the bargaining unit?

A: As long as you were a Full-Time eligible Member for a portion of the calendar year, you have access to the full PER allocation in that year.

Q: I am a Part-Time Member teaching one full course from September 2008 to April 2009 for the first time at Western. Am I eligible for any PER?

A: You have not met the threshold of one full-course equivalent in Calendar year 2008 and therefore would not be eligible. However you may qualify for PER for expenses incurred from January 1, 2009 to April 30, 2009 if you teach at least another half course in 2009.

Q: I was a Part-Time Member who taught 1.75 courses in Spring 2009. What would my entitlement be?

A: Since you were a Member while teaching, you are eligible for \$200 for the first full course equivalent, plus one half course at \$67 for a total of \$267.00, having met the threshold of 1.5 courses, but not 2.0 courses.

Q: I was Limited-Term (Full-Time) up to June 30, 2009 and then taught two Limited-Duties (Part-Time) courses in Fall 2009. What am I entitled to?

A: You cannot submit claims under both the Full-Time provisions and the Part-Time provisions. Having worked six months full-time, you would be entitled to claim the total of the PER available to Full-Time Members for Calendar Year 2009.

Q: I taught two half courses as a Part-Time Member in Winter 2009. I would have thought I would be eligible for the full \$200. However, further in the article it stipulates that a Member who has less than six months service is entitled to only one half of the PER. Am I eligible for \$200 or \$100?

A: That provision concerns newly-hired Full-Time Members and applies to full-time entitlements. As a former Part-Time Member, you are entitled to the full \$200.

Q: How do I find out how much I have left to claim?

A: It is recommended that Members track their own expenditures and balances independently. However, if Members need assistance they can contact Financial Services at travel@uwo.ca.

The information in this document is provided to assist Members and Administrators in understanding the provisions of the Professional Expense Reimbursement article in the Faculty Collective Agreement and other related agreed to matters. Reference should be had to the official version of the Collective Agreement and in case of any conflict, that document shall prevail.