

Faculty of Engineering and Applied Science

2011/ 2012 PROFESSIONAL EXPENSE REIMBURSEMENT GUIDELINES

Eligibility:

All Members with appointments during the period May 1, 2011 to April 30, 2012 are eligible for professional expense reimbursement as outlined in the Collective Agreement Article 36.3. If less than the maximum is incurred during the year, the balance can be carried forward for two years. Expenditures may not be carried forward to the next claim year.

Faculty with a new appointment or retirement during the claim period please note:

Faculty who either start or end their appointment during the claim period are eligible to receive the full amount. Expenses must be incurred either after the appointment start date or before the appointment end date as appropriate. Retiring faculty should submit their claim within the month following their retirement date.

Annual Maxima: Faculty Members (not including Term Adjuncts) - \$1,671

Term Adjuncts Faculty Members - \$238 per 0.5 credit course or equivalent

Method of Payment:

- **Original receipts or original invoices and proof of payment** must be submitted for all expenses. No photocopies. Invoices and receipts must be addressed to the applicant.
- The receipts must be dated during the period May 1, 2011 to April 30, 2012.
- Tax amounts must be recorded as requested.
- Please complete and attached the itemized list form to show details if you have more than one expense to claim. Paperwork must clearly identify the nature of the expense.
- Incomplete submissions will be returned to the applicant.
- Members may submit claims twice per fiscal year (May 1 to April 30).
- Payment will be made by direct deposit. University accounts will not be reimbursed.

Allowable Expenses: The PER program normally shall be used only to reimburse faculty members for the following professional expenses:

- Memberships for professional societies.
- Journal subscriptions and books.
- **Conference and research travel - *completed travel expense form must be attached. If a portion of the travel is funded through a source other than PER please provide the required coding and signature on the travel expense report and be sure to circle "yes" in the applicable section at the bottom of the claim form.***

Note: do not request a travel advance for travel that is to be funded through PER.

- Instructional supplies such as software, equipment, computing supplies, stationery supplies, page and reprint charges, etc.
- Cell phone, PDA or internet connection expenses must be pro-rated to reflect business use portion only. You must complete the itemized list form to show the percentage claimed.
- Office furniture and office equipment for use on campus only (not for home office). Decorative items for the office are not eligible.
- Professional/academic development or upgrading.
- Academic regalia.

PLEASE NOTE: Expenses claimed should be incurred by faculty members in order to maintain and enhance their academic and professional competence and disciplinary expertise. Expenses that are common to Queen's employees in general are not eligible. They include, but are not limited to, parking, University Club fees, briefcases, air conditioners, passport fees. The PEO Certificate of Authorization fee is also ineligible. For information please contact Karen Walker, Faculty of Engineering & Applied Science, 78211, karen.walker@appsci.queensu.ca.

MEMBERS PROFESSIONAL EXPENSE REIMBURSEMENT 2011-2012

Please note: This form is for the use of Engineering and Applied Science Members only

Claim Period: May 1, 2011 to April 30, 2012

Deadline for Submission: Sept. 1, 2012

Please refer to E&AS PER guidelines and Article 36.3 of the Collective Agreement for information.

Completed form must be submitted to the E&AS Office, Beamish-Munro Hall, Room 200

<i>Carry forward from 2009/10:</i>		Annual Maxima: <i>(See CA Article 36.3)</i> Members: (not including term adjuncts): \$1671 Term Adjuncts: \$238/.05 credit course or equivalent	
<i>Carry forward from 2010/11:</i>			
<i>Eligible Amount 2011/12:</i>			
<i>Total available:</i>			
<i>Previous claim in current claim period:</i>			
CATEGORY	\$ CDN Total (including taxes)	HST	GST
<i>Professional Dues</i>			
<i>Books & Journal Subscriptions</i>			
<i>Equipment and Supplies (computer, printer, software, office supplies, copying, long distance postage, etc.)</i>			
<i>Travel Note: attach completed travel expense form (IMPORTANT - SEE GUIDELINES)</i>			
<i>Cell Phone/PDA/Internet Connection Expenses Note: Please see guidelines</i>			
<i>Other (please specify)</i>		<i>Please note: To comply with Revenue Canada regulations all material included remains the property of Queen's University.</i>	
TOTAL:			

Signatures: I certify that the expenses claimed were incurred in order to maintain and enhance academic and professional competence and disciplinary expertise and that all expenses comply with Queen's policies:

Applicant:

Approver: (Dean or Department Head as required)

Name (please print)

Name (Please Print)

Signature

Employee Number

Signature

Date

Date

Payment information - Please reimburse the applicant above by direct deposit as follows:

	Chartfield	Total (Inc. tax)	GST	HST	Signature	Budget Approval
PER	10000/15001/641012/15002/3054					
Other						

