

Instructions for Professional Development "Small Claims and Professional Fees"
May 1, 2018 - April 30, 2019 Budget Year
Lorraine Oades

Part-time faculty members who have at least 12 credits of seniority, are under contract in the 2018-19 academic year and a current member at the Small Claims/Professional Fees application deadline, may apply to receive reimbursement for some of their Professional Development expenses and Professional Fees incurred from May 1, 2018 onwards. Professional Fees are fees that you are required to pay in order to practice your profession.

Should you wish to be considered for Small Claims and Professional Fees you are required to fill out two separate forms. The deadline for application is January 15, 2019, 3 p.m.

At this point, we cannot state how much money each of you may claim for 2018-19. After the committee awards the large grants to those who apply in the January 15 round, we will have a clearer indication as to how much money is left in the fund to be applied to Small Claims and Professional Fees. We will then need to consider how many eligible members are requesting reimbursements. It is critical that people submit applications on time.

Do not send any receipts at this time. Wait to hear if your application has been approved. Additional information as to how to process receipts will be provided at that time. Expenditures must be dated May 1, 2018 or later. As the paperwork will need to be processed by us and then by the budget officer in your faculty no later than March 30, we expect to process your claims in February and March.

When completing your claim forms, you will need original receipts, showing payments have been made (not billing you to make payment). The receipt should not have another person's name as purchaser. If you have purchased something online, you may use a printout as your receipt.

Items you may be allowed to claim:

- Books (relevant to your department; titles must be indicated on receipts; if absent, write them next to prices)
- Software (relevant to your department; titles must be indicated on receipts) Must be purchased through the University.
- Association memberships (relevant to your department; some restrictions apply). In the case of professional memberships, some will not be allowed. Be advised that any that are eligible are considered by the government to be a taxable benefit and will be noted on the taxation slips (T4 etc.) prepared by the University.
- Periodical subscriptions (relevant to your department)

- Photocopying
- Conference registration (modest amounts; relevant to your department)
- Office supplies (e.g., pens, paper, toner, discs, data keys, etc.)
- Art supplies (Fine Arts; relevant to your department)

Note:

- Postage will not be funded unless it is related to a reimbursable purchase such as books; or if you show it was to send a manuscript for publication (e.g., paper submitted to a periodical) or was directly related to research.

You cannot claim:

- Internet
- Hardware (e.g., computers, computer accessories, printers, scanners, etc.)
- Office furniture
- Parking
- Repairs to printers, computers, etc.
- Fees paid to guest lecturers

Claims refused by the University in the past included:

- Invoices or estimates. We can only process receipts showing proof of payment.
- Books where you were the author. You may only purchase someone else's book.
- Receipts that listed your academic affiliation as another university or institution. Concordia must be listed as your affiliation.
- Receipts dated from previous budget years. Remember the budget year is from May 1 to April 30.
- Receipts for refreshments, candy purchased at the Concordia bookstore, etc. will not be reimbursed.
- Receipts that show no store name.
- Copies of cheques you wrote. Only cheques returned from the bank as processed, can serve as proof of payment.
- Photocopies of receipts. You must provide the originals.

When your claim has been accepted and you are submitting your receipts, it is imperative that you follow instructions carefully. Failure to do so will result in your application being denied.

Should you have any questions, please do not hesitate to contact me by email (lorraine.oades@cupfa.org or through the CUPFA office: 514-848-2424 x3691).

CUPFA Professional Development
Small Claims – Request Form

DO NOT SEND ANY RECEIPTS WITH THIS APPLICATION!

Please print clearly using dark coloured ink and return to Lorraine Oades, CUPFA, S-K- 340. Your application must be received by CUPFA, no later than 3 p.m., January 15, 2019. If your application is accepted, you will receive further documents from us. Your claims will be processed by CUPFA between February and March 2019. They should be processed by the University by May 1.

Name _____ Credits of Seniority _____
(You must have 12 or more seniority points on the February 1, 2019 Seniority List)

Department(s) _____ Faculty(ies) _____

Home Address _____

Street City Province

Email _____

Telephone _____

Have you received small claims in the past? [] No [] Yes

If so, please indicate which academic year(s) _____

Please note items you wish to claim (please be as specific as possible) and amounts (in CAN\$). Use the back of the form if extra space is required. Estimates for purchases you have yet to make may be included. Please identify them as estimates. Acceptable items are listed in "Instructions for Professional Development Small Claims" 2018-19. When processed at a later date, original receipts must be in your name.

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

CUPFA Professional Development
Professional Fees – Request
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Name _____ Credits of Seniority _____

(You must have 12 or more seniority points on the February 1, 2019 Seniority List)

Department(s) _____
Faculty(ies) _____

Home
Address _____
Street # _____ City Province Postal Code _____

Email _____

Telephone _____

Have you been reimbursed by CUPFA for membership fees to belong to a professional association in the past? [] No [] Yes

If so, please indicate which academic year(s) _____

Is this membership a requirement listed on the course posting? [] No [] Yes

Please list the professional fees that you would like to be reimbursed for and include a copy of the related job posting. **DO NOT SEND ANY RECEIPTS WITH THIS APPLICATION!** When processed at a later date, original receipts must be in your name.

Please list the items you wish to claim in Canadian dollars.

_____ \$ _____
_____ \$ _____
_____ \$ _____

Total \$ _____