



## **Unit 1 Professional Expense Reimbursement Fund (PERF) Fall 2022 / Winter 2023**

### **Eligibility:**

**Instructors who have a full workload appointment** (15+ hours per week) are entitled to reimbursement of expenses of \$550 per semester to a maximum of \$1,100 per academic year.

**Instructors who have a reduced-workload sessional appointment** (9-14.99 hours per week) are entitled to reimbursement expenses of \$425 per semester to a maximum of \$850 per academic year.

**Effective 2022:** In order to make the claims process more efficient, going forward there will be only one claim period for Fall and Winter. Whether you hold a reduced or full sessional appointment in Fall only, Winter only or both Fall-Winter.

**Funds are limited and paid on a first come first served basis. Limited to 1 claim per academic year. All claims must be submitted by April 15th.**

### **Professional Expenses:**

- 1) Membership fees in learned societies and professional organizations;
- 2) Registration fees for meetings of learned societies, other professional organizations, conferences, seminars, workshops and similar professional activities;
- 3) Travel, accommodations and associated expenses related to meetings, conferences, seminars, workshops, study leave or similar professional activities not covered by or in excess of monies available from other funds for similar purposes. Travel to and from work (including clinical work) are NOT eligible expenses. i.e. NO car rental, gas, mileage, TTC (Presto cards) or GO Transit;
- 4) Books and subscriptions to scholarly journals;
- 5) Expenses associated with teaching: Supplies, materials and 50% of internet costs for 5 months per semester to a maximum of 10 months per academic year. You must upload the summary page containing the breakdown of internet costs for each month claimed;
- 6) Electronic devices and software: Computers, laptops, tablets and printers. Cell phones, office equipment and gift cards are NOT eligible expenses.

In order to retain nontaxable status of electronic devices claimed through this fund, the items purchased remain the property of Toronto Metro Politician. Therefore you are required to follow TMU Purchasing Services procedures for obtaining title before selling or otherwise disposing of the item. CUPE Local 3904 will retain a copy of the claim form(s) as a record of the nature and value of such purchases.

**For questions, please contact the Unit 1 VP (Chief Steward)**

**Kelly Train**

**[unit1vp@cupe3904.ca](mailto:unit1vp@cupe3904.ca)**

**[www.cupe3904.ca](http://www.cupe3904.ca)**



## 1) Complete all areas:

- Incomplete claims, claims without the proper banking information and claims without the proper backup as required below will be denied.

## 2) Purchases:

- Upload a copy of your invoice(s) and / or receipt(s).
  - Invoices must be in your own name and must clearly state company name, dated purchased, item(s) purchased, total paid and payment method.
  - Cash register receipts must clearly state company name, date purchased, item purchased, total paid and payment method.
  - If the invoice or receipt does not indicate amount paid and payment method, then you must upload proof of payment (credit card statement or bank statement).
- For online purchases.
  - Log into your online account to download the final invoice.
  - If the invoice or receipt does not indicate amount paid and payment method, then you must upload proof of payment (credit card statement or bank statement).
  - An order confirmation IS NOT considered proof of purchase.
  - We DO NOT accept screen shots.
  - The items must be delivered before submitting a claim.

## 3) Conferences, seminars, workshops, and meetings:

- Upload proof of registration and details.
- A description & an agenda of the event must be uploaded.

## 4) Foreign Exchange (F/X):

- To validate F/X rates upload a credit card statement or bank statement.
- For foreign credit cards and foreign bank statement(s) please upload foreign exchange rate calculated through bank of Canada.
- <https://www.bankofcanada.ca/rates/exchange/>

## 5) Deadline:

- Claims must be submitted between February 1 and April 15 2023.
- Receipts must be dated Aug 15, 2022 to April 15, 2023.
- All Payments are issued by electronic funds transfer (EFT) within 8 weeks.

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