

PROFESSIONAL EXPENSE REIMBURSEMENT (PER) GUIDELINES

FACULTY OF ARTS AND SCIENCE

ELIGIBILITY

All faculty members with appointments in the Faculty of Arts and Science at Queen's, during the period May 1 to April 30 in the fiscal year claimed, are eligible for professional expense reimbursement as outlined in [Queen's University Faculty Association \(QUFA\) Collective Agreement](#).

Expenses claimed must be incurred during the faculty member's employment period within the Faculty of Arts and Science at Queen's. All departing faculty, including retirees, can only claim receipts dated prior to the date of resignation/retirement and should submit their claim within one month following their departure from Queen's.

Please refer to most recent [QUFA Collective Agreement](#) for the annual maxima. If a faculty member incurs less than the maximum PER entitlement in any year, the remaining balance can be carried forward for a maximum of two (2) years; however, receipts must be dated during the period May 1st to April 30th of the current or preceding fiscal year. Expenses claimed must comply with University policies.

CLAIM PROCESS

Option 1 –Expense Reimbursement System (ERS) Submission

When completing your ERS claim, please ensure you make note of the following:

- Clearly state the claim type and your surname in the header section (i.e. PER – Smith)
- Enter your home department's financial information (fund 10000, department code 11xxx, and project 000000)
- Do not use the Professional Expense Reimbursement expense types. Please use expense types applicable to your claim (i.e. membership, registration/seminars, office supplies, etc.)
- Submit the ERS claim and select **Jenna Dijkema for Manager Approval**. If your claim is approved, the Faculty Office will forward your claim to the Department Head or Vice-Dean (where applicable) for one over approval.
- Additional guidance regarding ERS can be found at the following link:
<http://www.queensu.ca/financialservices/procedures/travel-and-related-expenses>

Option 2 – Completing the Professional Expense Reimbursement Form

- For hardcopy claims, all Claimants must complete the [PER claim form](#)
- All original receipts or original invoices with proof of payment are required. Photocopied receipts will not be accepted. *Note: copies of electronic receipts are acceptable for online purchases only*
- For travel related expenses, complete and submit a [travel claim form](#) along with the PER claim form
- All PER forms must be signed by the Claimant and the Department Head.
- All PER claim requests **must be submitted to the attention of Jenna Dijkema, Financial Analyst, in the Faculty of Arts and Science, Dean's Office**
- Incomplete submissions will be returned to the Claimant

ALLOWABLE EXPENSES

Allowable expenses are those incurred by a QUFA Member:

- a) to maintain and enhance their academic and professional competence, and their respective disciplinary or specialist expertise, as defined in the QUFA Collective Agreement;
- b) during their employment with the Faculty of Arts and Science at Queen's University;
- c) within the current or the preceding budget year; and,
- d) personally (i.e. no reimbursement of a university fund or project code will be made from PER).

The following expenses are eligible for PER funding:

1. **Membership fees** for professional associations and/or learned societies related to the faculty member's discipline
2. **Books, journals, subscriptions** or other similar professional publications
3. **Fees for professional/academic development or upgrading**, such as **conference or course registration fees**
4. **Travel** for attending relevant scholarly conferences/seminars or visiting other universities or research sites to conduct research and scholarly work. Please note the following:
 - Travel expenses submitted must comply with the University Travel Policy: <http://www.queensu.ca/secretariat/sites/webpublish.queensu.ca.uslclwww/files/files/policies/Travel%20and%20Expense%20Reimbursement%20Policy%20Mar2017v3.pdf>
 - If not submitting through ERS, you must complete both the [PER Claim Form](#) and [Travel Expense form](#).

- Travel advances are not available through Professional Expense Reimbursement
 - If claiming travel to a conference, the program or itinerary must be included
 - Travel expenses should be submitted within thirty days of trip completion. Travel expenses over 12 months old do not comply with the University Travel Policy and would require approval by the Principal, Vice-Principal, Associate Vice-Principal, or Dean.
5. Costs to prepare and complete **scholarly manuscripts** (i.e. page fees, print charges, etc.)
 6. **Instructional and research materials** such as software, equipment, computing supplies and/or stationery supplies
 7. **Research assistance:** Payments made to named businesses or institutions for services such as library reproductions or photo reprints are acceptable. Payments made by faculty members to individuals (i.e. graduate students) for research related assistance will only be reimbursed if sufficient documentation is provided (i.e. copy of agreement and proof of payment).
 8. **Usage fees for cell phones, PDAs or internet connections:** Please note that these expenses must be pro-rated to reflect the professional use portion only. Claimants need to submit a declaration of the percentage of professional usage and a copy of the statement for each month claimed.
 9. **Office furniture and office equipment** for use on campus only (not for a home office). Decorative items for the office are not eligible. "Office Equipment" may include computer-related peripherals such as printer, scanner, etc.
10. **Academic regalia**

Please note that In accordance with Queen's policy, materials claimed through this PER program remain the property of Queen's University.

ACCEPTABLE DOCUMENTATION/RECEIPTS

- a. **Purchases made in person:** Original receipts or original invoices along with proof of payment are required; photocopies will not be accepted.
- b. **On-line Purchases:** Print the electronic document that indicates the date, supplier, the nature and cost of the item(s), applicable taxes, GST Registration number, if applicable, and method of payment. If the method of payment is not noted on the receipt, attach documentation that indicates payment. For example, if paid by credit card, attach a copy of your credit card statement highlighting the specific transaction. You may obliterate any information on the credit card statement not relevant to the specific transaction.

- c. **Foreign Currency:** For expenses incurred in foreign currency, please provide the amount in Canadian dollars - e.g., if paid by credit card, please provide a copy of your monthly credit card statement highlighting the specific transaction and the exchange rate applied. You may obliterate any information on the credit card statement not relevant to the specific transaction. If the foreign expense includes a charge for GST -- for instance, when ordering a subscription paid in USD where GST is charged by the American publisher -- the GST amount should be converted to CDN at the same rate. If your expenditure was not charged to a credit card and you need to determine the rate, you can use the currency exchange rates (based on the date of the expense) listed on the Bank of Canada website: <http://www.bankofcanada.ca/rates/exchange/10-year-converter/>

CONTACT INFORMATION

If you have any questions regarding Professional Expense Reimbursement, please contact **Jenna Dijkema** by email at jlad@queensu.ca or by phone at **extension #77967**.