

Important Notice – Professional Development “Small Claims”
June 1, 2009-May 31, 2010 Budget Year
Leslie Cohen and Pankaj Kamthan

Regular part-time faculty members who have at least **12 credits of seniority**, may apply to receive reimbursement for some of their Professional Development expenses incurred from June 1, 2009 onwards. At this point, we cannot state how much money each of you may claim for 2009-2010. After the committee awards the large grants to those who apply in 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. We will then need to consider how many eligible members are requesting reimbursements. The maximum amount one can claim will be calculated by dividing the funds by the number of applicants. It is, therefore, critical that people submit applications on time.

Should you wish to be considered for small claims, we need to hear from you. Please complete the enclosed application form (also available at www.cupfa.org). The deadline for application is **Friday, January 15, 2010, 5 p.m.** After that deadline, should there be funds available, we will do our best to make accommodations; however, there is no guarantee we will have money, and your files will be processed on a first-come, first-served basis.

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 June 1, 2009 or later.** As the paperwork will need to be processed by us and then processed by the budget officer in your faculty no later than April 15, we expect to process your claims in **February and March**. If you need to process a receipt that will only be available in April or May, please contact me.

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)
- Software (relevant to your department; titles must be indicated on receipts)
- 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 you show it was to send a manuscript for publication (e.g., paper submitted to a periodical) or you can show it was directly related to research etc.
- Funding internet access has become problematic as some of you pay for bundles of service with Videotron, Bell, etc. The University will not fund your telephone bill or cable television access. You would need to demonstrate the cost of an ISP. These requests would then be subject to approval by the faculty and by financial services. CUPFA cannot guarantee these costs will be reimbursed. In future, these costs may no longer be accepted. If you file a tax deduction for home office expenses (see notice in newsletter), internet access may be claimed there.

You cannot claim:

- Hardware (e.g., computers, 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 June 1 to May 31.
- Receipts for refreshments, candy purchased at the Concordia bookstore, etc. will not be reimbursed.
- Receipts that show no store name or in the case of books etc. show not titles, are not acceptable.
- 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.

Pankaj Kamthan, member-at-large on the CUPFA Executive was a tremendous help in processing these files last year, and will again be working with me, **Leslie Cohen**, this year. Should you have any questions, please do not hesitate to contact us by email or through the CUPFA office (cupfa@alcor.concordia.ca; 514.848.2424 x3691).

**CUPFA Professional Development
Small Claims – Application Form**

DO NOT SEND ANY RECEIPTS WITH THIS APPLICATION!

Please print clearly using dark coloured ink (or complete a copy of this form available at www.cupfa.org and send a hard copy to cupfa@alcor.concordia.ca). Return to **Leslie Cohen, CUPFA, S-K- 340**. Your application must be **received** by CUPFA, no later than **5 p.m., 15 January, 2010**. *If your application is accepted*, you will receive further documents from us. Your claims will be processed by CUPFA between February 1 and April 1, 2010. They should be processed by the university by May 15, 2010.

Name _____ Credits of Seniority _____

You must have 12 or more seniority points on the February 1, 2009 Seniority List

Department(s) _____ Faculty(ies) _____

Home Address _____

Street City Province Postal Code

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 "Important Notice " – 2009-2010. When processed at a later date, **original receipts must be in your name**.

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