

Instructions for Professional Development "Small Claims"
May 1, 2016 - April 30, 2017 Budget Year
Lorraine Oades

Part-time faculty members who have at least **12 credits of seniority**, who are under contract in the 2016-17 academic year and are a current member at the Small Claims application deadline, may apply to receive reimbursement for some of their Professional Development expenses incurred from May 1, 2016 onwards. At this point, we cannot state how much money each of you may claim for 2016-17. 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. We will then need to consider how many eligible members are requesting reimbursements. It is 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. The deadline for application is **January 15, 2017, 3 p.m.**

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, 2016 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 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 Internet Service Provider (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, 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 (locupfa@gmail.com) or through the CUPFA office: 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 and return to **Lorraine Oades, CUPFA, S-K- 340**. Your application must be **received** by CUPFA, no later than **3 p.m., January 15, 2017**. If your application is accepted, you will receive further documents from us. Your claims will be processed by CUPFA between February and March 2016. They should be processed by the University by May 1, 2017.

Name _____ Credits of Seniority _____

You must have 12 or more seniority points on the February 1, 2017 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 "Instructions for Professional Development Small Claims" 2016-17. When processed at a later date, **original receipts must be in your name.**

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