

CUPFA Professional Development – Small Claims Process
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Professional Development

Please be sure to follow these instructions. Please help us to help you receive your funding promptly. Questions? Contact us: locupfa@gmail.com or cupfa@concordia.ca or 514-848-2424 x3691 – we will be happy to help you.

1. Prepare 8.5 x 11" pages

All receipts must be taped to 8.5 x 11" pages which are marked with your **full name, employee number, and the number on the claim for reimbursement form**. If you are going to use several pages, you may want to type these details in a Word file and print out pages as needed. Please mark these details at the **bottom, right-hand side** of the page.

2. Prepare your receipts:

Receipts must be dated from **June 1, 2012** to the present date.

All receipts must be originals. The name of the organization or store must be clearly indicated. If the purchase is a book or software, the title must be clearly indicated. If it has not been printed by the store register, print the title by hand. If the receipt is for Association membership and the association is listed only by an acronym (e.g., APA), please write the name in full. **If the purchase was not in Canadian funds, you must obtain and indicate the exchange rate for the date in question.** If you charged your item, check your credit card receipt for the exchange rate. Attach a copy of credit card statement (blacken out the account number). Alternately, the rate can be obtained from an internet site that shows historical exchange rates. **Include the internet printout including the date of purchase and exchange rate.**

If your receipt is already an 8.5 x 11" paper, leave it as is, but mark your name and employee number on the form. Otherwise, **please tape your receipts to 8.5 x 11" paper**. Do not staple the receipts. Do not tape receipts in two layers – all details must be visible to be photocopied or scanned by the budget officers.

If the receipt is too long for the page, please cut the receipt and tape the two pieces side-by-side. Try to ensure you do not cut out an item. Again, the principle is that all details should be visible and be able to allow someone to copy the page.

You should try to **group them by category** (e.g., all book receipts together). Please place them in **chronological order** from the oldest to the newest. You should **group by type of currency**, for example, all receipts for books purchased in US funds. Please use only one side of each page.

3. Complete the following fields on the claim form:

Please be sure to **print clearly using a dark ink pen.**

Please write your full name and home address (see upper left side).

Above your name, please write "Department: _____" and complete your department name. (**Do not write department at the bottom of the form**).

On the upper right side, please write the date, your employee number, and either email address or phone number, in case someone has to call you for clarification of your file. If you give a Concordia email address, you will be notified as to when the direct deposit has been made to your account. If need be, supply a home phone number instead of an internal one, and label it as a home phone number. Do not complete PD PO#.

At the bottom left, sign your name (see "Claimant's Signature").

4. Complete the center of the form:

You will need to complete: Date, Description, Account Code, and Canadian Currency. **If your purchase was in another currency, complete "Other Currency" and "Exchange Rate."** (See #2 above).

If you have more than one receipt for the same category of expenditures (e.g., books), do not list each receipt separately. Instead, obtain a total for Canadian currency expenditures; another for US\$. For example, you have three receipts for book purchases: one from Chapter's for \$16.50, one from the Concordia Bookstore for \$22.50, and one from Barnes and Noble for \$10.00US. Under description write "Books" and under "Canadian Currency" write \$39.00. Use a separate line for the US\$ book as you will need to indicate, \$10US, the exchange rate, and the conversion to Canadian \$. In the dates column, indicate the date in question, or if there are multiple dates, list the first date to the last (e.g., 11/08-01/09; month and year is sufficient).

If you have multiple purchases on a receipt – some to claim and some not – **be sure to calculate the tax owed for the appropriate purchases. Show your work.**

Some of the Account Codes are listed on the back of the form. Here are some of the codes you will likely need:

706RG Conferences- Registration

72000 Stationery and Office Supplies
 -pens, paper, stapler, clips, folders, etc.

72035 Computer Supplies (CDs, data keys, etc. – no hardware)
(Note: if these are on a receipt containing other office supplies – just use 72000 for all.)

72050 Toners (includes printer ink)
(Note: if this in on a receipt containing other office supplies – just use 72000 for all.)

7230 Books and Periodicals
72300 Books
72310 Magazines/Periodicals Subscriptions
72320 Newspaper Subscription

(Note: Remember titles must be indicated and must be relevant to your teaching/Department).

7310 Printing
73100 Printing Internal (e.g., Concordia)
73110 Printing External (e.g., XYZ Copy)

77105 Memberships
(Please note that some memberships are considered to be Professional memberships (77106). Some of these we do not reimburse at all, e.g., Order of Psychologists. For fees we do reimburse, some of these, e.g., Ontario Order of Professional Engineers, will be considered taxable income and will appear on your T4 slips. In the latter case, you may also claim a deduction for these expenses).

78300 Desktop Software Purchased
(Note: Remember the title must be indicated and must be relevant to your teaching/Department).

4. Total the entries:

Add all the entries in the “Canadian Currency” column.

5. Attach receipt pages:

Using a **clip**, attach the pages of the receipts to the claim form. Do not staple pages.

6. Submit the claim to CUPFA:

Send the claim to us in the mail (CUPFA, SGW – K- Annexe, Suite 340) or deliver it to us in person. **Make a copy of all documents and keep them on file.**

7. Wait to be paid:

If you are currently receiving pay, **you will be paid by direct deposit** to your bank account. **Watch your balance** and account statements for the amount you indicated on the claim form. Please allow for processing time. We must approve the file, then the budget officer for your faculty must approve it, then financial services must process it. Full-timers are also applying for PD funds at this time, so the budget officers are extremely busy. Please allow 8 weeks for processing.