Sessional Lecturer PDR
Claim Submission via Expense Claim System
Table of Contents

Professional Development Reimbursement (PDR) ......................................................... 2
CUPE 3913 Unit 2 Sessional Instructors ........................................................................ 2

Expense Claim System (ECS) ....................................................................................... 2

Instructions ....................................................................................................................... 3
Step 1 - Log into ECS .................................................................................................. 3
Step 2 - Add a New PDR Claim .................................................................................. 3
Step 3 - Enter General Information .......................................................................... 4
Step 4 - Expense Input Receipts – NOT Previously Claimed .................................... 5
Step 5 - Expense Input Receipts – Previously Claimed ............................................. 6
Step 6 - Coding ........................................................................................................... 7
Step 7 - Verify and Print Claim .................................................................................. 7
Step 8 - Submit the PDR Claim ................................................................................ 9

Reimbursement .............................................................................................................. 10

Professional Development Reimbursement (PDR)

CUPE 3913 Unit 2 Sessional Instructors
On an annual basis commencing in September of each year, the University will make available a professional development fund of $35,000. The purpose of this fund is to offset costs to the Sessional Lecturer to participate in academic conferences/seminars or to purchase materials in support of their professional/academic development. A Sessional Lecturer is entitled to such reimbursement to a maximum of $400 once per semester and subject to the availability of funds (total reimbursement for all Bargaining Unit members cannot exceed the amount available per year). In addition, any remaining funds may be transferred from one year to the next. Reimbursement to the allowable maximum is made upon receipt of original receipts detailing expenses. Please refer to Appendix C of the Unit 2 Collective Agreement.

For more information visit: https://www.uoguelph.ca/facultyrelations/tas-sessionals/sessional-lecturer-pdr

Expense Claim System (ECS)
All PDR claims are submitted electronically through the Expense Claim System (ECS). The ECS is the same system used for Travel & Expense Claims. Complete the ECS tutorial to understand the basics of the system. However, submitting a PDR has a different process than submitting a Travel & Expense Claim. Please follow the following instructions:

Note: It is recommended to use Google Chrome. Other browsers have had difficulty with key functions that are required when submitting a PDR claim.
Instructions

Step 1 - Log into ECS
Log into the ECS (https://ecs.cs.uoguelph.ca:8003) using your central login account. Click ‘Claims’ on the top right-hand corner. - It is recommended that you use Google Chrome, as others have had difficulty with other browsers.

Step 2 - Add a New PDR Claim
Click on ‘Add New Expense Claim’.
Step 3 – Enter Expense Claim Details
Please fill out the blanks highlighted in blue according to below:

- **Contact**: Your name.
- **Contact Phone #:** Your phone extension or cell phone.
- **Expenses Start**: Start date of your expense according to your receipts.
- **Expenses End**: End date of your expense according to your receipts. *(For example: If claiming computer/supplies expense, then the start and end date would be the same. If claiming expense for a conference, the start date would be the purchase date of conference and the end date would be the last day of travel.)*
- **Destination**: Location of your expense. *(Only complete if your PDR involved travel.)*
- **Purpose/Notes**: You MUST enter ‘CUPE 3913 Unit 2 – PDR for [semester and year]’ and an explanation of what the PDR was for, providing details. Include the College and Academic Unit(s) in which you teach. *(For example: Purchase new laptop for a DE course you are teaching; or Conference in Toronto which includes transportation and accommodations.)*
- **Supervisor/Chair**: Name of your Supervisor/Chair. *(They will be signing your PDR for submission.)*
- **Supervisor/Chair Title**: Title of your Supervisor/Chair.
- **Dean/Director**: Name of your Dean/Director. *(They do not have to sign your PDR for submission, unless you do not have a Supervisor/Chair.)*
- **Dean/Director Title**: Title of your Dean/Director.

Once all fields are complete, click ‘Save’.
Step 4 - Expense Input Receipts – NOT Previously Claimed

If a previous claim has been submitted and you are carrying forward from your PDR last semester, please skip to Step 5 ‘Expense Input Receipts – Previously Claimed’.

See ‘Expense Input’ section below the form you just completed. Enter all receipts according to below:

- **Entry #:** Each receipt is entered separately and numbered accordingly.
- **Receipt Date:** Date of purchase.
- **Expense Description:** A brief description of what the receipt is for. (For example: Laptop, laptop case, and charger; or hotel accommodations; or transportation to Toronto)
- **Expense Category Object Code:** Select the appropriate category or click ‘Other’.
- **Auto KM:** Complete only if mileage was involved for your PDR.
- **Location Tax:** What tax was charged on the purchase depending on the location of purchase. If your PDR involves air fare, click ‘Location Tax’ in blue text above the field.
- **Previous Paid Reference/Previous Paid:** Leave blank.
- **Canadian Amount:** Enter the amount on the receipt if it is in Canadian Dollars (CAD).
- **Currency/Exchange Rate/Foreign Amount:** Only complete if the purchase was not in CAD. For instructions to complete these fields, please watch the ECS tutorial.

Continue completing the fields for all subsequent receipts. If needed, add more rows by clicking ‘Add Row’ at the top of the ‘Expense Input’.

Example, $100 for textbooks, ‘Other’ Object Code 63103 - Supplies, Misc Teaching

Once all fields are entered, click ‘Save’.

Go to Step 6.
Step 5 - Expense Input Receipts – Previously Claimed

If this is a new PDR claim, please follow Step 4 - Expense Input Receipts – NOT Previously Claimed’ section above. This step is only necessary if the PDR claim is a carry forward from a previous semester.

See ‘Expense Input’ section below the form you just completed. Enter all receipts according to below:

- **Entry #**: Each receipt is entered separately and numbered accordingly.
- **Receipt Date**: Date of purchase.
- **Expense Description**: A brief description of what the receipt is for. (For example: Laptop, laptop case, and charger; or hotel accommodations; or transportation to Toronto)
- **Expense Category Object Code**: Select the appropriate category or click ‘Other’.
- **Auto KM**: Complete only if mileage was involved for your PDR.
- **Location Tax**: What tax was charged on the purchase depending on the location of purchase. If your PDR involves air fare, click ‘Location Tax’ in blue text above the field.
- **Previous Paid Reference**: Enter the reference # from the previous PDR submission. (It is a 5-digit number located on the first page of the printed PDR form; alternatively, check your history of claims in ECS. A copy of your previous PDR claim is required for submission.)
- **Previous Paid**: Respond ‘Yes’.
- **Canadian Amount**: Enter the full amount on the receipt if it is in Canadian Dollars (CAD).
- **Currency/Exchange Rate/Foreign Amount**: Only complete if the purchase was not in CAD. For instructions to complete these fields, please watch the ECS tutorial.

Continue completing the fields for all subsequent receipts. If needed, add more rows by clicking ‘Add Row’ at the top of ‘Expense Input’.

**Once all fields are entered, click ‘Save’.
Step 6 - Coding

Enter the following information in the Fund, Unit, Grant and Project fields:

Fund: 101
Unit: 002899
Grant: 000000
Project: 700083

Enter the receipt amount under the appropriate object code, i.e. Airfare 62407.

If Other Object Code, enter the appropriate Object Code for the current expense line. Help with Object Codes is available here - https://www.uoguelph.ca/finance/object_codes?OBJECT_ID=&OBJECT_DESC=teaching&CATEGORY_DESC=

Depending on the expense category selected in Step 4 or 5, an amount will appear in the applicable column, i.e. ‘Other Obj Code’. Enter the amount shown in “Total Claimed” in the first row of the column. The status will change to Complete.

Click ‘Save’.
Step 7 – Verify and Print Claim

Click on ‘Validate/Submit’.

If you have completed the form correctly, the Processing Status will say “Claim <number>: has been validated without warnings.”

If there are errors on the form, the Processing Status will provide details. Errors must be corrected before submission is finalized.

Once the claim is validated successfully, click “PDF Expense Claim Report”. (This will not work in Safari. Please use Google Chrome.)
The PDF of the Expense Claim Report is two pages. Print the report double-sided if possible. The second page must be printed landscape to ensure all coding is visible. Sign and date beside “Claimant”. Do not use electronic signatures.

<table>
<thead>
<tr>
<th>Expense Claim Summary</th>
<th>Total Trip Expense</th>
<th>Previously Claimed or Direct Effed</th>
<th>Expense Reimbursed This Claim</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsistence Transport</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meals with Receipts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media per Item</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air RMM (E)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conference Registration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel - Lodging</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel stay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>0000.00</td>
<td></td>
<td>2000.00</td>
</tr>
<tr>
<td>Net Specified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Expenses</td>
<td>0000.00</td>
<td></td>
<td>2000.00</td>
</tr>
</tbody>
</table>

By signing below, I hereby certify that all expenses being claimed are set out in this report in detail and correct, have been incurred for University purposes, have not previously reimbursed and that they were completed with University funds.

Claimant: Vicki

Signature

Date

I hereby certify that the expenses listed in this claim and that they are in compliance with University funds.

Supervisor: Chair

Signature

Date

Date

Note: This form may be required by concussion 2019

Print Date: 3 May 2019 Page: 2 of 1
Step 8 - Submit the PDR Claim
Submit both pages of the claim form as well as original receipts to your Department Administrator for Supervisor/Chair/Dean/Director approval. **Do not use electronic signatures. We will not accept electronic signatures.** The Department Administrator will submit forms to Payment Services, 5th Floor, University Centre, on your behalf.

If submitting a new PDR claim, be sure to include all your *original* receipts. Keep a copy of your submission and receipts; especially if another PDR submission is required for a subsequent semester.

If submitting a previously claimed PDR, be sure to include a copy of your previous submission and receipts.

Reimbursement
If the PDR claim is approved, reimbursements will be processed through direct deposit. If you do not have direct deposit, cheques will be mailed to your main department.