



OFFICE *of* THE PROVOST AND
VICE-PRESIDENT (ACADEMIC)

FACULTY AND ACADEMIC STAFF RELATIONS

Sessional Lecturer PDR Claim Submission via Expense Claim System

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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 \$55,000 as of September 1, 2021. 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 \$500 once per semester and subject to the availability of funds (total reimbursement for all Bargaining Unit members cannot exceed the amount available per year, therefore a claim may be pro-rated if funds exceeded). In addition, any remaining funds at the end of the academic year may be transferred from one year to the next. Reimbursement to the allowable maximum is made upon receipt of original receipts (not orders) detailing expenses. Please refer to Appendix C of the Unit 2 Collective Agreement.

Submission Deadlines:

Fall Semester Deadline: February 1
Winter Semester Deadline: June 1
Summer Semester Deadline: October 1

Reimbursements are processed AFTER the deadline for each semester.

During W20, S20, F20, W21, S21 and F21, claimants and department supervisors must submit all claims to ecs@uoguelph.ca with the email approval language “I approve claim... for \$...”. [Instructions for email approval.](#)

FASR reviews and reimbursement occurs AFTER the deadline for each semester.

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

Expense Claim System (ECS)

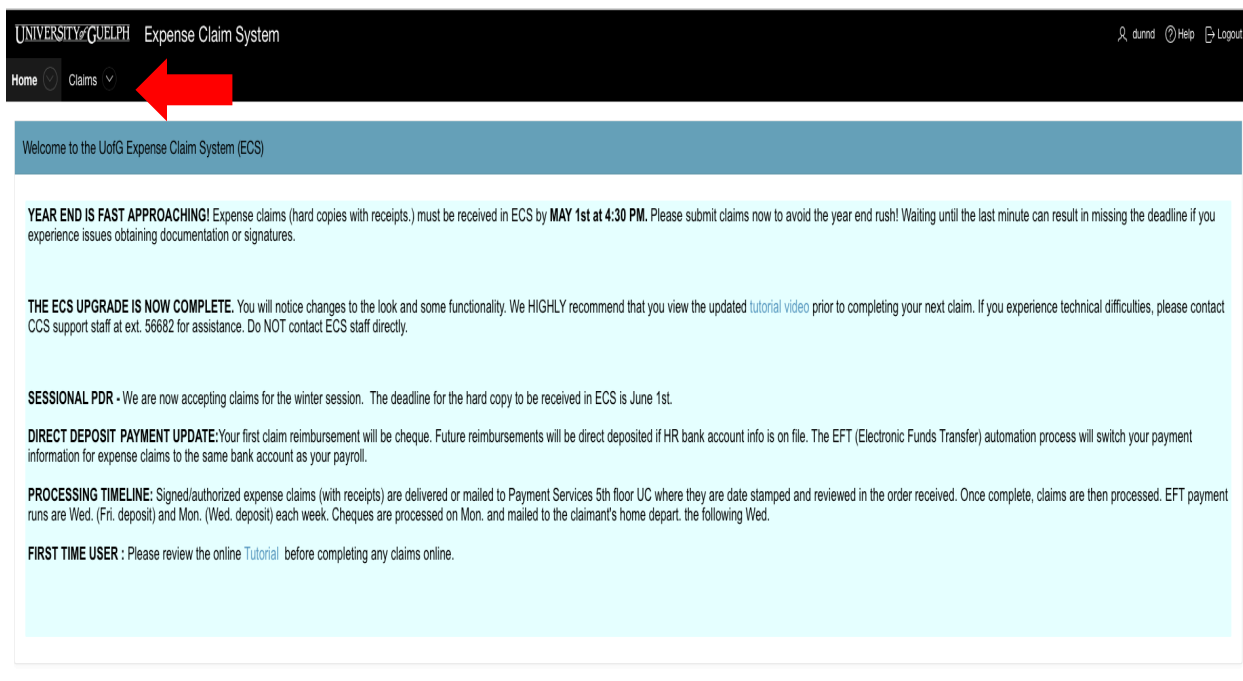
All PDR claims are submitted electronically through the [Expense Claim System \(ECS\)](#). The ECS is the same system used for Travel & Expense Claims. Complete the [ECS tutorial](#) to understand the basics of the system. However, **submitting a PDR has a different process than submitting a Travel & 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.

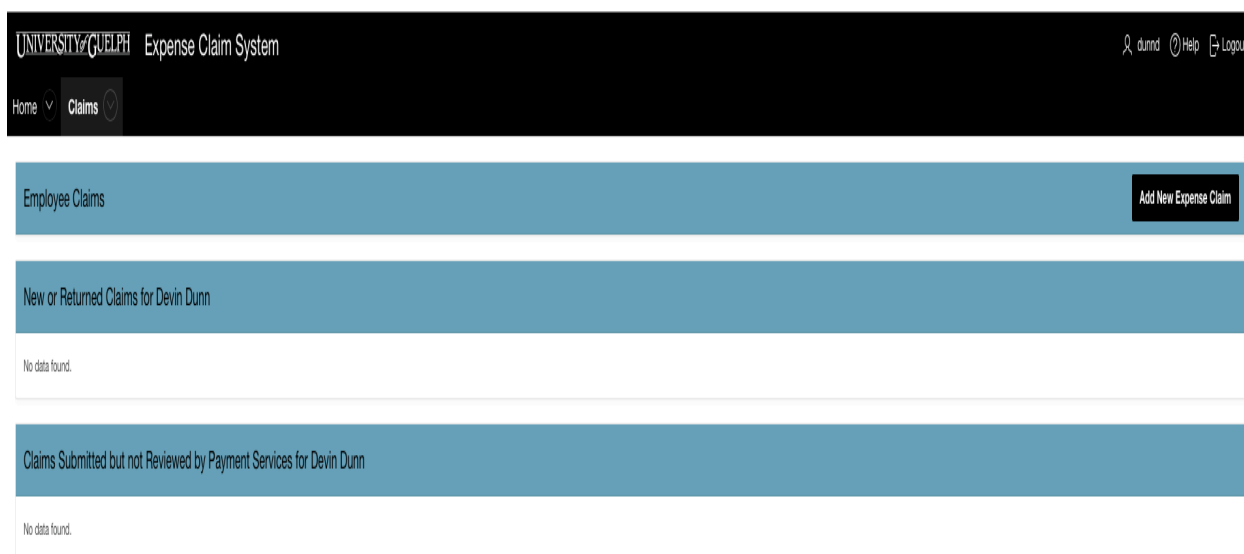


The screenshot shows the top navigation bar of the University of Guelph Expense Claim System. The bar is dark with the university logo and name on the left, and user information (dunnid) and links for Help and Logout on the right. Below the navigation bar, there is a 'Home' button and a 'Claims' dropdown menu. A red arrow points to the 'Claims' dropdown menu. The main content area has a blue header with the text 'Welcome to the UofG Expense Claim System (ECS)'. Below this, there is a light blue box containing several announcements:

- YEAR END IS FAST APPROACHING!** Expense claims (hard copies with receipts.) must be received in ECS by **MAY 1st at 4:30 PM**. Please submit claims now to avoid the year end rush! Waiting until the last minute can result in missing the deadline if you experience issues obtaining documentation or signatures.
- THE ECS UPGRADE IS NOW COMPLETE.** You will notice changes to the look and some functionality. We HIGHLY recommend that you view the updated [tutorial video](#) prior to completing your next claim. If you experience technical difficulties, please contact CCS support staff at ext. 56682 for assistance. Do NOT contact ECS staff directly.
- SESSIONAL PDR** - We are now accepting claims for the winter session. The deadline for the hard copy to be received in ECS is June 1st.
- DIRECT DEPOSIT PAYMENT UPDATE:** Your first claim reimbursement will be cheque. Future reimbursements will be direct deposited if HR bank account info is on file. The EFT (Electronic Funds Transfer) automation process will switch your payment information for expense claims to the same bank account as your payroll.
- PROCESSING TIMELINE:** Signed/authorized expense claims (with receipts) are delivered or mailed to Payment Services 5th floor UC where they are date stamped and reviewed in the order received. Once complete, claims are then processed. EFT payment runs are Wed. (Fri. deposit) and Mon. (Wed. deposit) each week. Cheques are processed on Mon. and mailed to the claimant's home depart. the following Wed.
- FIRST TIME USER :** Please review the online [Tutorial](#) before completing any claims online.

Step 2 - Add a New PDR Claim

Click on 'Add New Expense Claim'. If you accidentally create multiple claims you can reuse a claim number that hasn't been submitted.



The screenshot shows the 'Expense Claim System' interface for the University of Guelph. The top navigation bar includes the university logo, the system name, and user options (dunn, Help, Logout). Below this, a 'Home' and 'Claims' dropdown menu is visible. The main content area is titled 'Employee Claims' and features a prominent 'Add New Expense Claim' button in the top right corner, which is highlighted by a red arrow. Below this, there are two sections: 'New or Returned Claims for Devin Dunn' and 'Claims Submitted but not Reviewed by Payment Services for Devin Dunn', both of which currently show 'No data found.'

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 SESSIONAL – 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'

Expense Claim Details

Return / Cancel

Reference	Claim Date	05-MAR-2019	Claim Status	New	Claimant	Your Name	
Contact				Supervisor / Chair			
Contact Phone #				Supervisor / Chair Title			
* Expenses Start	DD-MON-YYYY			Dean / Director			
* Expenses End	DD-MON-YYYY			Dean / Director Title			
Destination				Tri Council	Yes No		
* Purpose / Notes	CUPE 3913 Unit 2 SESSIONAL – PDR Winter 2019						
Advances	ECS Checklist						
* Validated	No	* Submitted	No	Submitted Date	Submit Status	Not Submitted	

Save



Step 4 - Expense Input Receipts – NOT Previously Claimed

If a previous claim has been submitted for this expense, i.e. laptop \$1200 and you are carrying forward from your PDR a prior 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'.

The screenshot shows the 'Expense Input' form. At the top, there are status indicators for 'Validated' (No), 'Submitted' (No), and 'Submit Status' (Not Submitted). Below these are buttons for 'Save', 'Validate/Submit', and 'PDF Expense Claim Report'. The main section is titled 'Expense Input' and contains a table with columns: Entry #, Receipt Date, Expense Description, Expense Category Obj..., Auto KM, Location Tax, Prev Paid Ref, Previous Paid, Canadian Amount, Currency, Exchange Rate, Foreign Amount, and Can \$ Equiv. A red arrow points to the 'Add Row (below current row)' button above the table. The table currently has one row with the following data: Entry # 1, Receipt Date 01-MAY-2019, Expense Description Text books for teaching cour..., Expense Category Obj... Other, Auto KM Ontario, Prev Paid Ref, Previous Paid No, Canadian Amount 100, Currency, Exchange Rate, Foreign Amount, and Can \$ Equiv 100. At the bottom left of the table is a 'Save' button.

Example, \$100 for textbooks, 'Other' Object Code 63103 - Supplies, Misc Teaching

This screenshot shows the 'Expense Input' form with a completed entry. The table has one row with the following data: Entry # 1, Receipt Date 01-MAY-2019, Expense Description Text books for teaching cour..., Expense Category Obj... Other, Auto KM Ontario, Prev Paid Ref, Previous Paid No, Canadian Amount 100, Currency, Exchange Rate, Foreign Amount, and Can \$ Equiv 100. A red arrow points to the 'Save' button at the bottom left of the table. Below the table is a summary table with the following data:

Category	Amount
Total Expenses	\$100.00
Total Coded	\$100.00
Previously Claimed	\$0.00
Reimbursed This Claim	\$100.00
Total KM	0.00
Total Lines (max 60)	2

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 current PDR claim is a carry forward from a previous semester claim, i.e. claim 2 of 3 for a laptop purchased for \$1200.

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 claim # 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](#).
- **On a new expense line, add the current claim expense for the carry over item using same object code but Previous Paid will be 'No'.**

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'.

The screenshot shows the 'Expense Input' section of a web form. At the top, there are status indicators for 'Validated' (No), 'Submitted' (No), and 'Submitted Date'. Below these are buttons for 'Save', 'Validate/Submit', and a link for 'PDF Expense Claim Report'. The main section is titled 'Expense Input' and contains a table with columns: Entry #, Receipt Date, Expense Description, Expense Category Obj..., Auto KM, Location Tax, Prev Paid Ref, Previous Paid, Canadian Amount, Currency, Exchange Rate, Foreign Amount, and Can \$ Equiv. A red arrow points to the 'Add Row (below current row)' button above the table. Another red arrow points to the 'Save' button at the bottom left of the table. The table currently has one row selected.

Repeats steps for each purchase in your claim.

Step 6 - Coding

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

Fund: 101

Unit: 002899

Grant: 000000

Project: 700083

Coding Input

Coding in Ontario Expense (Ontario 13% HST Paid)

Search: All Text Columns Go Edit Add Row (below current row) Reset

St...	Fund	Unit	Grant	Project	Airfare	Surface Tran...	Accommodation	Meals	Auto KM	Conference ...	TI (Obsolete)	Hospitality Catg	Hospitality Amt	Other Obj Co...	Other Amount
<input checked="" type="checkbox"/>	101	002899	000000	700083											

1 rows selected

Save

Coding Summary	Airfare 62407	Surf Transport 62406	Accommodation 62406	Meals 62405	Auto KM 62409	Conference Reg 62553	TI (Obsolete) 62410	Hospitality Catg	Hospitality Amt	Other Obj	Other Amt
Total Claimed											
Total Coded											
Difference											
Status											

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**.

Coding Input

Coding in Ontario Expense (Ontario 13% HST Paid)

Search: All Text Columns Go Edit Add Row (below current row) Reset

St...	Fund	Unit	Grant	Project	Airfare	Surface Tran...	Accommodation	Meals	Auto KM	Conference ...	TI (Obsolete)	Hospitality Catg	Hospitality Amt	Other Obj Co...	Other Amount
<input checked="" type="checkbox"/>	101	002899	000000	700083										63102	100.00

1 rows selected

Save

Coding Summary	Airfare 62407	Surf Transport 62406	Accommodation 62406	Meals 62405	Auto KM 62409	Conference Reg 62553	TI (Obsolete) 62410	Hospitality Catg	Hospitality Amt	Other Obj	Other Amt
Total Claimed											100.00
Total Coded											100.00
Difference											
Status											Complete

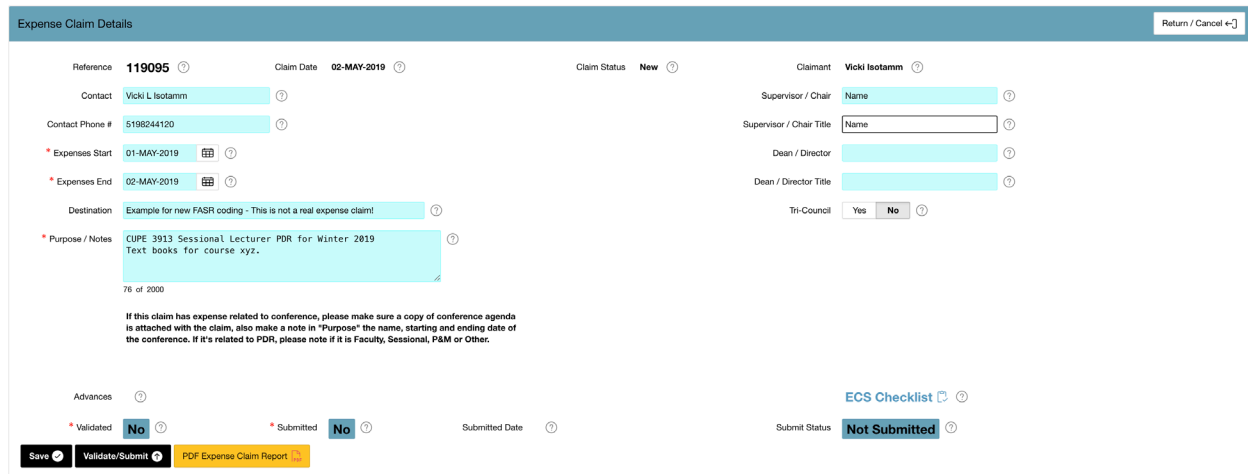
Click 'Save'.

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.

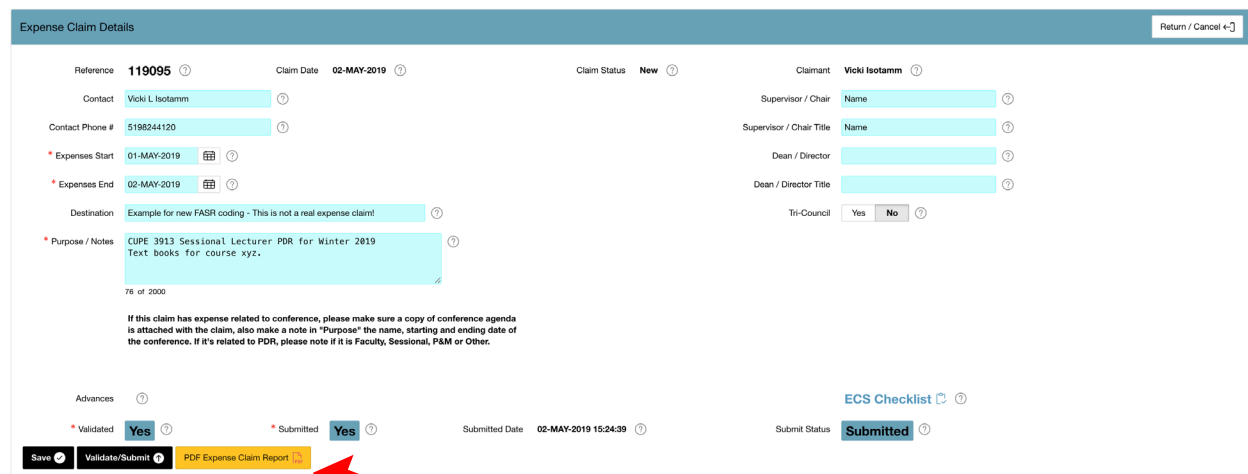


The screenshot shows the 'Expense Claim Details' form for claim 119095. The 'Validated' status is 'No'. A red arrow points to the 'Validate/Submit' button.

Field	Value
Reference	119095
Claim Date	02-MAY-2019
Claim Status	New
Claimant	Vicki Isotamm
Contact	Vicki L. Isotamm
Contact Phone #	5198244120
* Expenses Start	01-MAY-2019
* Expenses End	02-MAY-2019
Destination	Example for new FASR coding - This is not a real expense claim!
* Purpose / Notes	CUPE 3913 Sessional Lecturer PDR for Winter 2019 Text books for course xyz.
Advances	No
* Submitted	No
Submitted Date	
Submit Status	Not Submitted

Buttons: Save, Validate/Submit, PDF Expense Claim Report, ECS Checklist.

Once the claim is validated successfully, click “PDF Expense Claim Report”. (This will not work in Safari. Please use Google Chrome.)




The screenshot shows the 'Expense Claim Details' form for claim 119095. The 'Validated' status is 'Yes'. A red arrow points to the 'PDF Expense Claim Report' button.

Field	Value
Reference	119095
Claim Date	02-MAY-2019
Claim Status	New
Claimant	Vicki Isotamm
Contact	Vicki L. Isotamm
Contact Phone #	5198244120
* Expenses Start	01-MAY-2019
* Expenses End	02-MAY-2019
Destination	Example for new FASR coding - This is not a real expense claim!
* Purpose / Notes	CUPE 3913 Sessional Lecturer PDR for Winter 2019 Text books for course xyz.
Advances	Yes
* Submitted	Yes
Submitted Date	02-MAY-2019 15:24:39
Submit Status	Submitted

Buttons: Save, Validate/Submit, PDF Expense Claim Report, ECS Checklist.

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. For W20, S20, F20, W21, S21 and F21, all claims must be submitted using email approval signatures.**



Travel and Business:

Claimant: Isotamm, Vicki
 Home Department: PROVOST/VP ACADEMIC
 Expense Claim Ref #: **119095**
 Claim Date: 02-MAY-2019
 Expenses Start: 01-MAY-2019
 Expenses End: 02-MAY-2019

Destination: Example for new FASR coding - This is not a real expense claim!

Purpose/Notes: CUPE3913 Sessional Lecturer PDR for Winter 2019
Text books for course xyz

This claim is identified as a Tri-Council Grant: N

Expense Category	Total Trip Expense	Previously Claimed Or Direct Billed	Expense Reimbursed This Claim
Airfare			
Surface Transport			
Accommodations			
Meals with Receipts			
Meals per Diem			
Auto KM (\$)			
Conference Registration			
Travel - Incidentals			
Hospitality			
Other	100.00		100.00
Not Specified			
Total Expenses	100.00		100.00

By signing below, I hereby certify that all expenses being claimed are net of any supplier rebates and discounts; were incurred for University business purposes; were not previously reimbursed and that they are in compliance with University policies.

Isotamm, Vicki
Claimant _____ Signature _____ Date _____

I, below, I hereby certify that I have reviewed the expenditures on this claim and that they are in compliance with University policies, including that they were not previously reimbursed and that they are in compliance with University business purposes.

Supervisor / Chair _____ Signature _____ Date _____

***Dean / Director** _____ Signature _____ Date _____

*Dean / Director signature is required for claims over \$5,000.

Contact: Vicki Isotamm
Contact Phone: 5198244120
Created by: v.isotamm

Expense Claim for Isotamm, Vicki Reference: 119095

Entry No	Receipt Date	Expense Description	Expense Category Object	Auto Km	Location Tax	Previous Pay Reference	Prev. Pay	Canadian Dollar Expense	Currency	Exchange Rate	Foreign Amount	Can \$ Equivalent
1	01-MAY-2019	Text books for teaching course xyz	Other		Out			100.00				100.00
Summary Totals: Total Expenses			100.00	Total KM 0		Previously Claimed/Direct Bill 0.00			Expense Reimbursed This Claim			100.00

Coding Input - In Ontario Expenses (Ontario HST Paid)

Fund	Unit	Grant	Project	Airfare	Surface Transport	Accommodations	Meals	Auto KM (\$)	Conference Registration	Travel Incidentals	Hospitality Object Code	Hospitality \$ Amount	Other Object Code	Other \$ Amount
101	002899	000000	700083	62407	62408	62406	62405	62409	62553	62410			63102	100.00
Total Coded												100.00		
Total Claimed												100.00		
Difference												0.00		
Status												Complete		

Other Province Expenses (within Canada non Ontario)

Fund	Unit	Grant	Project	Airfare	Surface Transport	Accommodations	Meals	Auto KM (\$)	Conference Registration	Travel Incidentals	Hospitality Object Code	Hospitality \$ Amount	Other Object Code	Other \$ Amount
				62407	62408	62406	62405	62409	62553	62410				
Total Coded														
Total Claimed														
Difference														
Status														

Outside Canada Expenses (No GST &/or HST)

Fund	Unit	Grant	Project	Airfare	Surface Transport	Accommodations	Meals	Auto KM (\$)	Conference Registration	Travel Incidentals	Hospitality Object Code	Hospitality \$ Amount	Other Object Code	Other \$ Amount
				62407	62408	62406	62405	62409	62553	62410				
Total Coded														
Total Claimed														
Difference														
Status														

Step 8 - Submit the PDR Claim

Instructions since W20 - [Instructions to submit for email approval during COVID-19](#).

Instructions Prior to W20: 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

FASR reviews and reimbursement occurs AFTER the deadline for each semester.

Fall Semester Deadline: February 1

Winter Semester Deadline: June 1

Summer Semester Deadline: October 1

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.