



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

FACULTY AND ACADEMIC STAFF RELATIONS

CUPE3913 Unit 2
Sessional Lecturer
Professional Development
Reimbursement (PDR)
Claim Submission via
Concur

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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 \$65,000 as of September 1, 2022. 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

FASR reviews and processes AFTER the deadline for each semester. Reimbursement occurs once all semester submissions have been reviewed and processed.

Information about [CUPE 3913 Unit 2 Sessional Lecturer Professional Development Reimbursement](#) is available.

Concur Expense Claim system replaced ECS during winter 2023.

CONCUR Expense Claim System

All PDR claims are submitted electronically through the [Concur Expense Claim System](#). There are many resources available to help with the use of Concur on the [Travel and Expense Claims SharePoint](#) page including: a [Getting Started Guide](#) and [User Guides](#).

Watch the [Concur claimant video tutorial](#) to understand the basics of the system.

Learn how to select your approver in Concur by reviewing the [Concur Approval Workflow Guide](#).

Note: The browser Firefox has a default setting that automatically downloads PDFs that users upload. Turn the setting off when using Concur.

Depending on your browser's settings, you may see "Expense Report" or "Expense Claim". These means the same thing.

Instructions

Step 1 – Log into Concur using your UofG Single Sign On

<https://www.concursolutions.com/>

Bookmark this link for future use.

Step 2 – Start a new Expense Claim/Report

1. From the Concur home page, click on + New > Start a Report.
2. OR From the Concur home page, click Expense (top left) > Manage Expenses page, click on Create New Report.
3. Complete the report header ensuring the following is completed.
 - a. Report Name – Initials-YYMMDD-CUPE3913, i.e. VI-230501-CUPE3913
 - b. Expense Start Date should be the beginning of the current semester.
 - c. Expense End Date should be the end of the current semester.
 - d. Fund - 101
 - e. Unit - 002899
 - f. Grant - 000000
 - g. Project - 700083
 - h. Brief Purpose/Notes – CUPE 3913 Unit 2 SL PDR Claim for Semester/Year (i.e. W23).
 - i. Detailed Purpose/Notes – Enter a description of your expense, cost of expense, amount of Claim (\$500 is the maximum), amount to be carried forward if applicable.
 - j. Review and click Create Claim/Report.
4. Click Add Expense
 - a. Click Create New Expense
 - b. Search for the expense type, i.e. books
 - c. Complete the additional fields on the New Expense page

- i. Transaction date should be the receipt date within the Expense Start and Expense End dates entered above.
 - ii. Location tax is one of Ontario, Other Provinces, Outside Canada
 - iii. Vendor Name if applicable (note: this is not a mandatory field)
 - iv. Amount of expense. If > \$500 claim the max \$500. You will have entered the carry over amount in the Detailed Purpose/Notes of report header
 - v. Currency
 - vi. The Fund, Unit, Grant and Project will autofill with what was entered in the report header. Do not revise.
- d. Click Add Receipt
 - i. Upload the receipt (.png, .jpg, .jpeg, .pdf, .tif, .tiff formats are accepted). You can take a picture of your receipt with a cell phone or scan from a printer. The receipt will display to the right of the expense information.
- e. Click Save Expense if you are done OR Click Save and Add Another if there are more items to claim. All expense receipts for the semester should be added. If the total claim exceeds \$500, additional expenses can be set to \$0.00 in the amount field for carry forward claim in a future semester.
- f. If you have lost a receipt you can complete the Missing Receipt Declaration.
 - i. After you complete the expense entry, on the main expense summary page, select the checkbox of the expense missing a receipt.
 - ii. Click Manage Receipts and select the Missing Receipt Declaration and complete the Create Receipt Declaration.
- g. When all PDR expenses for the current semester have been input and there are no warning alerts, click on Orange Submit Expense button at the top right of the monitor.
- h. Read the User Electronic Agreement and then click Accept and Continue.
- i. A summary of the expense will display. Click Submit Claim/Report.
- j. The Edit Approval Flow window will open. Follow the directions in the next section.

Step 3 - Concur Approval Workflow

On the **Edit Approval Flow** page, you will see two fields by default:

1. Department/Grant Signing Authority: Chair, Department Head, Grant Holder or Delegate.
2. Above \$10K/Policy Exception Approver: Dean/Non-Academic Director

The screenshot displays the 'Edit Approval Flow' dialog box in SAP Concur. The dialog is titled 'Edit Approval Flow' and contains the following elements:

- Alerts:** 1
- Claim:** A warning message: "You must identify an approver before the expense report proceeds to the next workflow step."
- + Add Step:** A button to add a new step.
- Department/Grant Signing Authority (must meet one-up approval rule):** Chair, Department Head, Grant Holder or Delegate. This field is highlighted with a red box and contains a search dropdown and a 'Search by Last Name' input.
- + Add Step:** A button to add a new step.
- Above \$10K/Policy Exception Approver (only if applicable):** Dean / Non-Academic Director. This field is highlighted with a red box and contains a search dropdown, a 'Search by Last Name' input, and a 'Delete' button.
- + Add Step:** A button to add a new step.
- Approval for Processing:** An empty text input field.
- Buttons:** 'Cancel' and 'Submit Claim' at the bottom right.

The background shows an expense report for \$0.01, with a 'Not Submitted' status and a 'Report Number' field. The report is for a 'Cash' payment type.

Enter the Approvers


- Search for Chair/Director/Supervisor of your current academic work assignment and enter in first field.
- Ignore the second field for Above 10k/Policy Exception.
- **Click +ADD STEP directly after the Department/Grant Signing Authority field. Add Vicki Isotamm to the User-Added Approver field. This is mandatory for all CUPE 3913 Unit 2 Sessional Lecturer PDR claims and is the final approver step.**

Approval for Processing field is a read-only field for the Payment Services ECS Team. Ignore this field. Financial administrator's who normally review/assist with your CUPE3913 PDR claim should continue to do so before submitting the claim to your supervisor for approval.

Edit Approval Flow ×


Alerts: 1 ^

Claim

 You must identify an approver before the expense report proceeds to the next workflow step.

[+ Add Step](#)

Department/Grant Signing Authority (must meet one-up approval rule): Chair, Department Head, Grant Holder or Delegate

▼ CHAIR / SUPERVISOR / DIRECTOR 

+ Add Step

Above \$10K/Policy Exception Approver (only if applicable): Dean / Non-Academic Director

▼ Search by Last Name Delete

[+ Add Step](#)

Approval for Processing

Cancel Submit Claim

- When completed the Edit Approval Flow should look like the screen below:

Edit Approval Flow ×

Alerts: 1 ^

Claim

You must identify an approver before the expense report proceeds to the next workflow step.

[+ Add Step](#)

Department/Grant Signing Authority (must meet one-up approval rule):
Chair, Department Head, Grant Holder or Delegate

▼ CHAIR / SUPERVISOR / DIRECTOR

[+ Add Step](#)

User-Added Approver

▼ ISOTAMM, VICKI (visotamm@exec.uog...

[+ Add Step](#)

Above \$10K/Policy Exception Approver (only if applicable): Dean / Non-Academic Director

▼ Search by Last Name [Delete](#)

[+ Add Step](#)

Approval for Processing

[Cancel](#) [Submit Claim](#)

- Click Submit Claim/Report.
- Report Submitted status should display. Click on Close.
- Your home page should display the submitted claim summary with a green banner.
- Click on SAP Concur on the top left corner of the monitor to return to the home page
- Log out of Concur

Reimbursement

FASR reviews/approves claims and reimbursement of claims occurs AFTER the submission deadline for each semester.

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.