



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

(Instructions for Sessional Lecturers teaching at the University of Guelph-Humber)

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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

Faculty & Academic Staff Relations (FASR) at the University of Guelph 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. (Instructions: <https://support.mozilla.org/en-US/questions/985483>)

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

Before purchasing any software, please check if it is available through the University of Guelph CCS software distribution website -
<https://uoquelpca.sharepoint.com/sites/ccs/sitepages/software.aspx>

If you are unsure whether a specific item is eligible under the PDR fund, please get in touch with us via gadmin@uelphhumber.ca.

Instructions

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

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

Bookmark this link for future use.

Sign In

Username, verified email address, or SSO code

Next

Remember me
[Forgot username?](#)

[Need support or not yet a Concur customer?](#)

In case the system tells you that you have an incorrect password, in a separate tab, login to Gryph Mail first (mail.uoguelph.ca), and then open a new tab and use the link mentioned above to log in to Concur.

If you still have issues logging in, please email: concurproject@uoquelpca with your Guelph username.

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 – “Your Initials-YYMMDD-CUPE3913”, e.g., “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 (e.g., 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.
 - i. Remember to include that you teach at the University of Guelph-Humber. (For example: Purchase of a new laptop for a DE course; or Conference in Toronto which includes transportation and accommodations. Teaching at the University of Guelph-Humber.)
 - j. Review and click Create Claim/Report.
4. Click Add Expense
 - a. Click Create New Expense
 - b. Search for the expense type, e.g., 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 (Note that books are taxed at GST in Ontario. Vendor Name if applicable (note: this is not a mandatory field)
 - iii. 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. In such cases, include a note such as: “claiming max \$500 for [Semester] of \$[enter total dollar value of receipts] and carry over is \$[enter total dollar value of receipts] - current \$500 max claim.
 - iv. Currency
 - v. 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.
Ensure you are submitting receipts that show proof of payment (rather than order confirmations/invoices).
- 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. Receipts are required for all regular expenses \$15 and over. If a receipt is missing for an expense, the expense can be entered in Concur, and a Missing Receipt Declaration attached:
 - 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 inputted and there are no warning alerts, click on the Orange Submit Expense button at the top right corner.
- 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, enter the approvers as follows:


Enter the Approvers

- Click **+Add Step** directly before the Department/Grant Signing Authority. Add gadmin@uoguelph.ca to the User-Added Approver field. This is mandatory for all CUPE 3913 Unit 2 Sessional Lecturer PDR claims who teach at the University of Guelph-Humber.
 - We will review your claim and send for approval to the Associate Vice-Provost, Academic (George Bragues). We will then attach his approval to your claim before the claim proceeds through the rest of the approval process.
- In the Department/Grant Signing Authority field, add Vicki Isotamm. This is mandatory for all CUPE 3913 Unit 2 Sessional Lecturer PDR claims who teach at the University of Guelph-Humber and is the final approver step.
- Ignore the field for Above 10k/Policy Exception.

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

[+ Add Step](#)

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

[Delete](#)


[+ Add Step](#)

Approval for Processing

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


Edit Approval Flow x

Claim

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


[+ Add Step](#)

User-Added Approver *

GHADMIN, Guelph Humber Admin (ghadmin@uoguelph.ca) x Delete 

[+ Add Step](#)

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

ISOTAMM, VICKI (visotamm@exec.uoguelph.ca) x 

[+ Add Step](#)

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

Delete

[+ Add Step](#)

Approval for Processing

Cancel Submit Claim

Approval for Processing field is a read-only field for the Payment Services ECS Team. Ignore this field. Administrators (ghadmin@uoguelph.ca) who normally review/assist with your CUPE3913 PDR claim should continue to do so before submitting the claim for approval.

- 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

Faculty & Academic Staff Relations (FASR) at the University of Guelph 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.

Submission Deadlines

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