

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 \$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)

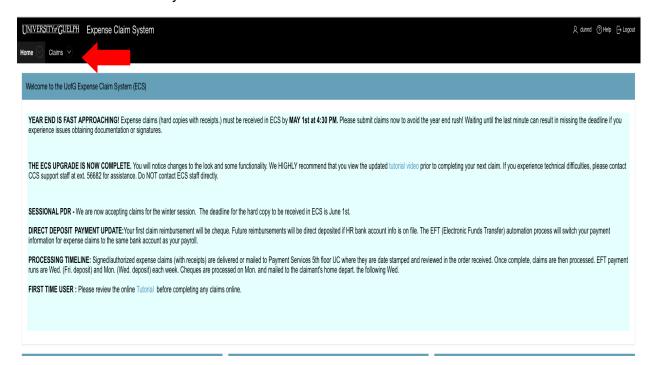
All PDR claims are submitted electronically through the <u>Expense Claim System (ECS)</u>. The ECS is the same system used for Travel & Expense Claims. Complete the <u>ECS tutorial</u> to understand the basics of the system. However, **submitting a PDR has a different process than submitting a Travel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

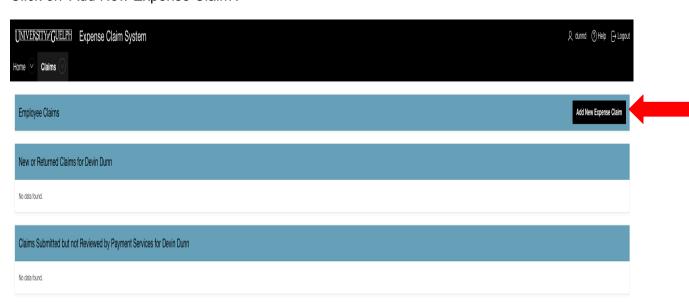
Step 1 - Log into ECS

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'.

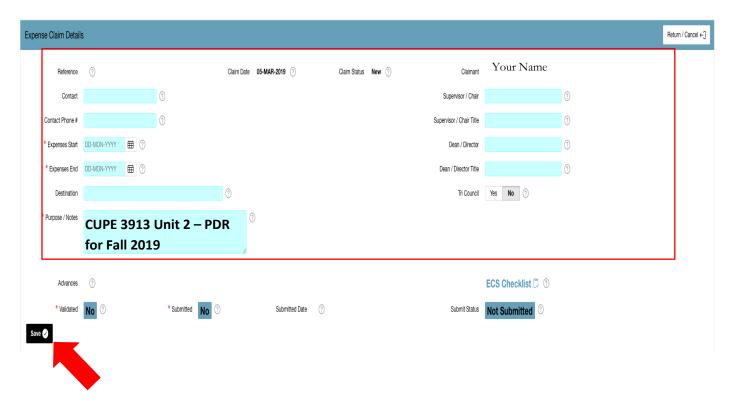


Step 3 – Enter Expense Claim Details

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 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'.

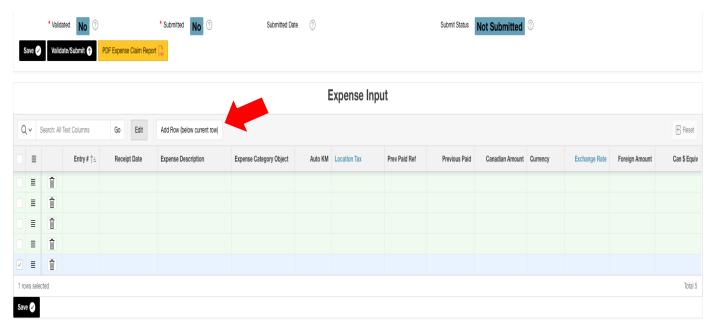


Step 4 - Expense Input Receipts - NOT Previously Claimed If a previous claim has been submitted and you are carrying forward from your PDR last semester, please skip to Step 5 'Expense Input Receipts - Previously Claimed'.

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 <u>ECS tutorial</u>.

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



Once all fields are entered, click 'Save'.

Go to Step 6.

Step 5 - Expense Input Receipts - Previously Claimed

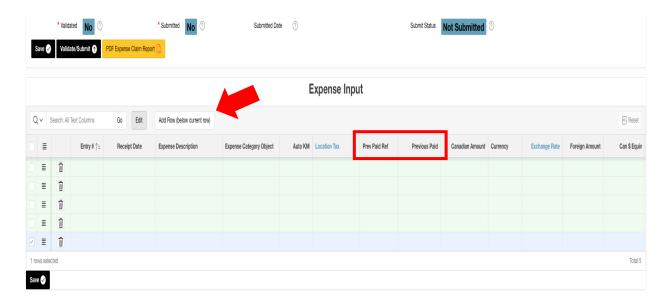
If this is a new PDR claim, please follow Step 4 - Expense Input Receipts – NOT Previously Claimed' section above. This step is only necessary if the PDR claim is a carry forward from a previous semester.

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 <u>ECS tutorial</u>.

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'.

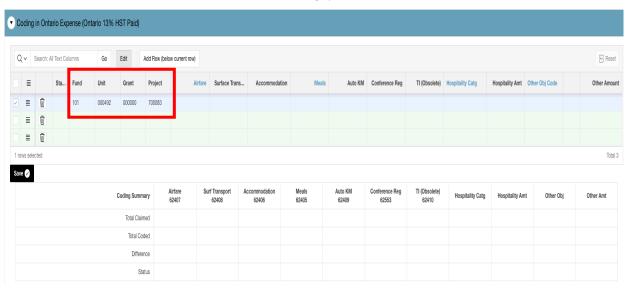


Step 6 - Coding

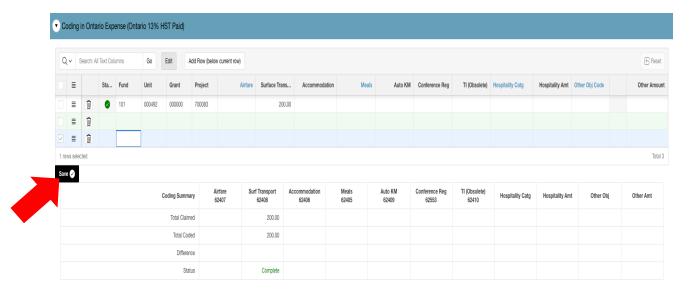
Enter the following information in the Fund, Unit, Grant and Project fields:

Fund: 101 Unit: 000492 Grant: 000000 Project: 700083

Coding Input



Depending on the expense category selected in Step 4 or 5, an amount will appear in the applicable column. Enter the amount shown in "Total Claimed" in the first row of the column. The status will change to Complete. Click 'Save'.



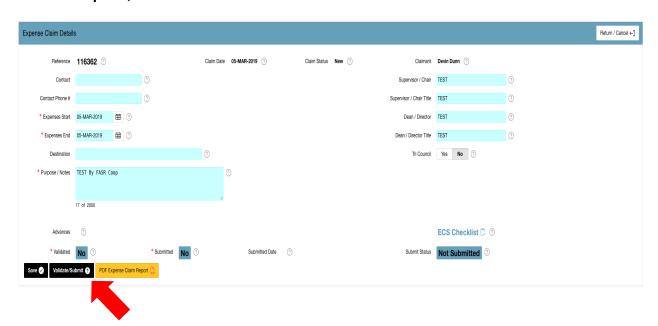
Step 7 – Verify and Print Claim

Click on 'Validate/Submit'.

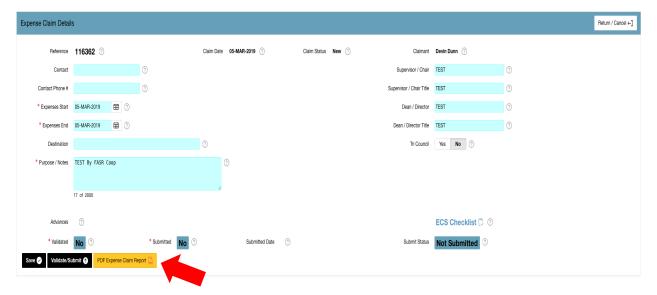
If you have completed the form correctly, the Processing Status will say "Claim <number>: has been validated without warnings."

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

Once complete, click 'Save'.



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.

Destination				AR-2019		
Purpose/Notes Ti	EST By FAS	SR Coop				
This claim is identifi	ed as a Tri-0	Council Grant: N				
Expense Claim Sum	nary					
Expense		Total Trip		Previously Claimed	Expense Reimbursed	
Category		Expense		Or Direct Billed	This Claim	
Airfare						
Surface Transport		2	200.00		200.0	0
Accommodations						_
Meals with Receipts						_
Meals per Diem						
Auto KM (\$)						_
Conference Registrati	on					_
Travel - Incidentals						_
Hospitality Other						_
Not Specified						_
Total Expenses		2	200.00		200.0	<u></u>
Total Expenses			200.00		200.0	V
business purposes; were not j Dunn, Devin Claimant	elow, I hereby c	oursed and that they are in Signature ertify that I have reviewed	n complian	nditures on this claim and that th	Date	
	that they were	ncurrea for University ou	isiness pui	poses.		
TEST / TEST		Sienature			Date	
Supervisor / Chair TEST / TEST		ng-active			Date	
*Dean / Director		nature			Date	
* Dean / Director signature is r	equi. dain	as over \$5,000.				
						_
Contact:		Contact Phone:	_		Created by: dunnd	_

Expense Claim for Dunn, Devin Reference: 116362

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	
0	05-MAR-2019	Transportation	Surface Transport		Ont			200.00					200.00
Summary	Totals: Total Expe	mses 200.00	To	tal KM 0		Previousl	y Claimed/	Direct Bill 0.00		Expense R	eimbursed Th	is Claim	200.00

Coding Input - In Ontario Expenses (Ontario HST Paid)

					Surface	Accommo-		Auto	Conference	Travel	Hospitality			
				Airfare	Transport	dations	Meals	KM (\$)	Registration	Incidentals	Object	Hospitality	Other	Other
Fund	Unit	Grant	Project	62407	62408	62406	62405	62409	62553	62410	Code	\$ Amount	Object Code	\$ Amount
101	000492	0000000	700083		200.00									
			Total Coded		200.00									
	Total Claimed				200.00									
	Difference				0.00									
Status					Complete									

Other Province Expenses (within Canada non Ontario)

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

Outside Canada Expenses (No GST &/or HST)

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

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.

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