

**PROFESSIONAL DEVELOPMENT
IN-SERVICE PROFESSIONAL DEVELOPMENT – EXPENSE CLAIM GUIDELINES**

- ✓ All expense claims must be submitted to HR by **February 28** in order to be eligible for reimbursement. For events and expenses that occur in February and March, it is the employee's responsibility to make arrangements with the Professional Development (PD) Assistant to submit expense claim after this deadline.
 - ✓ Expense claims for events must be submitted within 30 days of activity completion.
 - ✓ Expense claims for tuition must be submitted within 30 days of payment receipt.
1. Use most current UFV Expense Claim form:
<http://www.ufv.ca/media/assets/finance/forms/fillable/ExpenseClaimForm.pdf>
 2. Fill in the following blanks (all writing must be in pen and legible):
 - ✓ Name
 - ✓ Banner ID
 - ✓ Home Address
 - ✓ Date
 - ✓ Department
 - ✓ PD Approval # (written at top of form)
 - ✓ Select method of Payment (Direct Deposit, Cheque, Mail, Internal)
 - ✓ **Signature of Claimant** – Expense Claim will NOT be processed without this
 3. Itemize each expense on the claim form:
 - ✓ Each expense should include the date it was paid and a description
 - ✓ **Mileage** reimbursement rate is at the current rate and is calculated based on departure from home address or home campus address (whichever is closer to destination). Mileage can only be claimed when using personal vehicle. If vehicle is a rental, you may not claim mileage but may instead claim gas receipts.
 - ✓ Employees are eligible for a per diem to cover **meal costs**, or they may be reimbursed by submitting detailed/itemized receipts. **Either method may be used but only one method can be applied for a trip.** If travel is within Canada or the US, the per diem allowance is \$10/breakfast, \$15/lunch and \$25/dinner. (US per diems will need to be converted into CAD funds). If travelling outside of Canada or the US, please contact the Professional Development Assistant in order to calculate the per diem rate or visit the following website: http://www.njc-cnm.gc.ca/directive/app_d.php?lang=eng
 - ✓ Attach all **original** receipts in the same order that they appear on the expense claim form.
 4. All expenses paid in currency other than Canadian, must be converted into Canadian funds:
 - ✓ **If you paid by a Canadian credit card**, claim the Canadian amount paid on this card, and include a copy of the credit card statement as proof of the Canadian amount paid. (Please black-out or white-out any personal information on statement).
 - ✓ **If you paid in foreign cash**, go to the Bank of Canada currency converter website at: <http://www.bankofcanada.ca/rates/exchange/10-year-converter>
Enter transaction date, transaction amount and the appropriate currencies to use. Click convert. Use this Canadian amount on your expense claim and attach the conversion page to your claim.
 5. Total all expenses
 6. Once completed, submit expense claim form and all necessary receipts and documentation to HR for processing.

UFV is not responsible for any expense claims lost during delivery. As a result, it is recommended that employees take a photocopy of all receipts before submitting the originals to Human Resources. If you have any questions or concerns, please contact in-service_pd@ufv.ca or local 5133.