



UFV In-Service Professional Development (PD)

Training on New PD Application Process

Land Acknowledgement



We would like to begin by acknowledging that the land on which we gather is the traditional, ancestral and unceded territory of the Stó:lō, people of the river on which UFV is located. We honour the Stó:lō Nation's stewardship of these lands and waters and express our gratitude for the opportunity to live, learn, and work here.

Learning Objectives



1.) Identify Key Changes: employees to identify the major differences between the old and new In-Service Professional Development (PD) application processes.

2.) Understanding the New System & Processes:

employees to navigate the new In-Service Professional Development (PD) application form, related processes, and know-how to complete and submit a PD application form using UFV's HR Service Catalog ticketing system.

This training will cover:

- A. In-Service Professional Development (PD) overview
- B. What changed?
- C. How to complete a PD application form using UFV's HR Service Catalog ticketing system
- D. Employee's responsibilities as an applicant/submitter
- E. Direct Supervisor/Exempt Administrator's responsibilities as approver
- F. Frequently Asked Questions (FAQs)

Agenda

A. In-Service Professional Development (PD) Overview



- Employees are encouraged to engage in professional development (PD) activities related to current or future employment opportunities at UFV.
- The in-service professional development (PD) fund covers events, conferences, workshops, tuition support, annual professional memberships, and resource materials align with the PD criteria established by the Joint Professional Development Committee.

PD CRITERIA

The following criteria have been established by the Joint Professional Development Committee for the administration of the In-Service Professional Development Fund.

An In-Service Professional Development application must meet the general criteria listed below and contribute to the professional development of the employee by:

- Developing and upgrading UFV job-related skills, knowledge, tasks and philosophies and/or;
- Preparing for reasonable career advancement within UFV in an area relevant to and available at UFV (a reasonable expectation must exist that advancement may result from pursuing the activity) and/or;
- Identifying the value to the institution related to UFV strategic goals (wellness, indigenization, EDI, etc.)

- The purpose of today's session is simply to walk you through the new PD application process, but to learn more about UFV's In-Service Professional Development program, please visit the UFV PD website link below where you can find information such as:
 - ✓ What does in-service PD fund covers
 - ✓ What is the PD application process and how to submit a PD application
 - ✓ What are the PD criteria and guidelines, tips to supervisors in reviewing & approving a PD application
 - ✓ What are the PD allowable and ineligible expenses
 - ✓ How you can check your PD fund balance and expenditures
 - ✓ What are the examples of PD activities that employees have been doing
 - ✓ Whom I can ask for support if I have PD related questions

A. In-Service Professional Development (PD) Overview

UFV PD website:

<https://www.ufv.ca/hr/learning-and-development/professional-development-fund/>

What Changed?



From:

Manual PD application submission & approval using a PDF form and email

- **Employee completes** a PD application form using the **PDF form** and **emails** it to their direct supervisor/exempt administrator for approval. The application will then be forwarded to HR for processing and final approval.
- **Supervisors/exempt administrators sign** the PD application in **PDF form** and **email** it to HR for final processing.
- **HR process** the PD application form and **emails** the PD approval memo to the employee and supervisor/exempt administrator.

To:

Online PD application submission & approval using HR Service Catalog system

- **Employee completes** a PD application form **online** through **HR Service Catalog**. This will **automatically get submitted** to employee's direct supervisor/exempt administrator to seek approval.
- **Supervisors/exempt administrators sign** the PD application **online through HR Service Catalog**. This will **automatically get submitted** to HR for final processing.
- **HR processes** the PD application form in **HR Service Catalog** and **emails** the PD approval memo to the employee and supervisor/exempt administrator.

PD Application Process

Application process

There are two different types of application forms for Professional Development; one for Events & Tuition, and another form for Memberships & Resource Materials. All forms should now be submitted through the HR Service Catalog System.

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the [In-Service Professional Development criteria](#). If the direct supervisor is not an exempt administrator, then the application will require a second signature from the exempt administrator.

1

Submit application to supervisor

Fill out the applicable [PD application form](#) and submit it to your direct supervisor using this HR Service Catalog System.

2

Receive approval for application

Your application will automatically be forwarded to Human Resources for review and processing. Final approval notification will be sent to you from HR.

3

Make the purchase and/or attend the activity

Once you have received a confirmation email from HR approving your request, you may make the purchase and/or attend the activity.

4

Submit post-PD report within 10 days

Tell us about your activity! You are required to complete this fillable [post-PD report](#) (for conferences, workshops, courses, trainings, and events), have it reviewed and signed by your supervisor, and email it to in-service_pd@ufv.ca within 10 days of the completion of your activity.

5

Submit your expense claim

Review the [In-Service PD: Allowable Expenses](#) then complete and submit your claim through the [Emburse Expense Management System](#) for reimbursement.

Please see [user guide](#) on how to submit your PD expense claim through the Emburse Expense Management System.

System Demo

C. How to complete a PD application form using UFV's HR Service Catalog ticketing system

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 1: Go to UFV Professional Development (PD) website

<https://www.ufv.ca/hr/learning-and-development/professional-development-fund/>

Step 2: From the PD website, in the PD Application Process, click “PD application form” and it will open the HR Service Catalog ticketing system for you to access the PD form.

Application Process

There are two different types of application forms for Professional Development; one for Events & Tuition, and another form for Memberships & Resource Materials. All forms should now be submitted through TeamDynamix (TDX) system.

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the [in-service Professional Development criteria](#). If the direct supervisor is not an exempt administrator, then the application will require a second signature from the exempt administrator.

1) Submit application.

Fill out the applicable [PD application form](#) and submit it to your direct supervisor using this TeamDynamix (TDX) system.



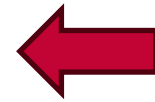
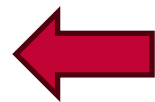
Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 3: In the HR service catalog page, click the applicable PD application form that you need to complete and submit.

HR
Service
Catalog
page:

The screenshot shows the University of the Fraser Valley HR Service Catalog page for Professional Development. The header includes the university logo, a search bar, and the user name "Maria De Guzman". The navigation bar has links for Home, Projects, Services, and Knowledge Base. Below this is a secondary navigation bar with links for Project Requests, Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, and Search. The main content area is titled "Professional Development" and includes an "Overview" section with text about professional development activities and a link to the "UFV HR Professional Development Fund website". It also includes an "Application Process" section with two steps: "1. Submit application." and "2. Receive approval for application." The right sidebar contains four green buttons: "Submit Events and Tuition Application Form", "Submit Memberships & Resource Materials Application Form", "Share", and "Add to Favorites". Below these buttons is a section titled "Service Offerings (2)" which lists two application forms: "PD Application Form - Events and Tuition" and "PD Application Form - Memberships & Resource Materials".



System Demo

Example: Events and Tuition PD Application Form

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. Example: Events and Tuition Application Form

Home Projects Services Knowledge Base



Service Catalog / Working at UFV / Professional Development / Professional Development / PD Application Form - Events and Tuition

PD Application Form - Events and Tuition [+ Show Help](#) [- Hide Help](#)

Click on the "Events and Tuition Application Form" button and complete all required fields on the form.


All fields marked with an asterisk (*) are required.

Prior to completing and submitting this PD application form, please ensure that you have reviewed and discussed the proposed activity with your supervisor.

Name *  

This application must only be submitted by the individual requesting PD.

Maria De Guzman [▼](#) [🔍](#) [✕](#)

Department * 

Department of the applicant


Human Resources [▼](#) [🔍](#) [✕](#)

Employee ID *

123456789

Position Title *


PD Assistant

Direct Supervisor * 

PD applications must be reviewed and supported by the applicant's direct supervisor. If the applicant's direct supervisor is a non-exempt (unionized) supervisor, then the application will require a second signature from the applicant's exempt administrator.

ONLY fill out this field if your supervisor is a non-exempt employee and then enter your exempt administrator below.

Start typing... [▼](#) [🔍](#) [✕](#)

Exempt Administrator * 

Enter the applicant's exempt administrator's name in this field:

Nancy Scarrow [▼](#) [🔍](#) [✕](#)

This field triggers the automatic approval workflow.

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Events and Tuition Application Form**

Home Projects Services Knowledge Base

Application Type *
☐ Event (Conference/Workshop) ☐ Tuition ☒ Both

Name of the Event *
Example: Conference Name

Location of the Event *
Victoria, BC

Event Start Date *
11/10/2025

Event End Date *
11/11/2025

Does this activity take place during regular scheduled work hours? *
☒ Yes ☐ No

Provide all specific dates you will be absent *
November 10, 2025

Will you be presenting at this event? *
☒ Yes ☐ No

Do you require a replacement for this event? *
☐ Yes ☒ No

Are you requesting to borrow additional funds from your next fiscal allocation? * ⓘ
Permanent employees are eligible to request for up to two years of funding for a single event if the activity is more than their full annual PD allocation amount. You must have at least 50% of your current fiscal allocation in-fact to qualify.
☐ Yes ☒ No

Note: Select what kind of PD application type you are requesting.
Employee has the option to apply for an "event" and "tuition" at the same time by clicking "Both"

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Events and Tuition Application Form**

Home Projects Services Knowledge Base

Are you currently enrolled in an accredited program? *

☒ Yes ☐ No

Enrolled Program Type *

☐ Certificate ☐ Diploma ☒ Degree ☐ Masters ☐ PhD

Course Name(s) *

Example: Bachelor of Business Administration course: BUS100 Introduction to Business

Institution *

UFV

Start Date *

1/2/2026

End Date *

3/31/2026

Does this course take place during regular scheduled working hours? *

☐ Yes ☒ No

Are you requesting to borrow additional funds from your next fiscal allocation? *

Permanent employees are eligible to request for up to two years of funding for a single event if the activity is more than their full annual PD allocation amount. You must have at least 50% of your current fiscal allocation in-fact to qualify.

☐ Yes ☒ No

How does this event or education program contribute to your professional development? *

<ENTER YOUR FULL RATIONALE HERE FOR THE PD ACTIVITY YOU ARE REQUESTING>

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Events and Tuition Application Form**

Home Projects Services Knowledge Base

Estimated Expenses

Refer to the PD Allowable Expenses document for approvable expenses. Expenses must meet the guidelines for final reimbursement.

Per Diem Meals *
☒ Yes ☐ No

Apply for Breakfast (\$10) *
☒ Yes ☐ No

Number of days *

Breakfast Total * ?
Number of days x \$10

Apply for Lunch (\$15) *
☐ Yes ☒ No

Apply for Dinner (\$25) *
☐ Yes ☒ No

All Meals Total * ?
Breakfast Total + Lunch Total + Dinner Total

Apply for Accommodation? *
☒ Yes ☐ No

Number of nights *

Cost per night *

Accommodation Total * ?
Number of nights x Cost per night

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. Example: Events and Tuition Application Form

Home Projects Services Knowledge Base

Apply for Travel? *

☒ Yes ☐ No

By Vehicle - number of kms

70

Vehicle total @ .59 cents ?

Number of kms x 0.59

41.30

Airfare

0

Travel Total * ?

Vehicle total + Airfare

41.30

Other travel expenses *

☒ Yes ☐ No

Taxi, ferry, etc. * ?

Explain any other travel expenses incurred.

FERRY - \$100.00

Other travel expenses total *

100

Activity registration cost *

100

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Events and Tuition Application Form**

[Home](#) [Projects](#) [Services](#) [Knowledge Base](#)

Activity registration cost *

Course Cost *

Textbook(s) Cost * ⓘ
Enter 0 if no textbooks are purchased.

TOTAL

Total cost of Event * ⓘ
Per Diem Meals Total + Accommodation Total + Travel total + Other travel expenses total + Activity registration cost.

Total cost of Tuition * ⓘ
Course Cost + Textbook(s) cost

NOTE: Please ensure to convert all foreign currency to Canadian dollars using the Bank of Canada exchange rate.

Do you want to use Training & Development funds (if available to you) to cover any expenses over your PD allotment? *

☐ Yes ☒ No

ADVANCE REQUESTED? (minimum \$500) *

☐ Yes ☒ No

If an advance is requested, please complete and attach the [ADVANCE REQUEST FORM AND AGREEMENT](#) together with this PD application form.

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Events and Tuition Application Form**

[Home](#) [Projects](#) [Services](#) [Knowledge Base](#)

Approvals

- Applicant to meet and review with supervisor
- Application must be submitted and approved PRIOR to attending an activity or making a PD purchase
- Application must be complete, clear, legible and signed
- Applications must include all supporting documents related to request (brochures, course descriptions, membership details, link)
- It is the employee's responsibility to confirm funding availability with HR prior to incurring expenses
- Incomplete applications will not be processed and will be returned
- For PD activities involving international travel, please contact UFV International at StudyAbroad@UFV.ca to discuss UFV's policies, procedures, and best practices surrounding international travel. General information is available online via [UFV's international travel guide for employees](#)

Attachment *

File attachments associated with the ticket. Please attach all supporting documents related to request. (e.g. brochures, course descriptions, event/membership/resource material details, links, advance request form if applicable, etc.)

Browse...

No file chosen

Additional Comments

Submit

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 5: Review and click "Submit". Example: Events and Tuition Application Form

[Home](#) [Projects](#) [Services](#) [Knowledge Base](#)

Approvals

- Applicant to meet and review with supervisor
- Application must be submitted and approved PRIOR to attending an activity or making a PD purchase
- Application must be complete, clear, legible and signed
- Applications must include all supporting documents related to request (brochures, course descriptions, membership details, link)
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File attachments associated with the ticket. Please attach all supporting documents related to request. (e.g. brochures, course descriptions, event/membership/resource material details, links, advance request form if applicable, etc.)

[Browse...](#) *No file chosen*

Additional Comments

[Submit](#)

Employee's view: Confirmation of PD Form Submission notification



Step 6: Receive submission confirmation and email notification

HR Service
Catalog:



✓ Request Created Successfully!

Service Request ID: 2912966

What do you want to do now?

- [Create another request of this type](#)
- [View the request you just created](#)
- [View your ticket requests](#)

EMAIL:

TeamDynamix Service Request Created (PD Application Form - Membe...)



Maria De Guzman <notify-ca@teamdynamixapp.com>
To: Maria De Guzman

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Details

Maria De Guzman created this service request on Thu 11/6/25 3:44 PM Pacific Standard Time.

Service Request Created

Acct/Dept

Human Resources

ID

2912966

Type

PD Applications

Title

PD Application Form - Memberships and Resource Materials

Notified

Maria De Guzman <Maria.DeGuzman@ufv.ca>

Created By

Maria De Guzman

System Demo



Example: Memberships & Resource Materials PD Application Form

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 1: Go to UFV Professional Development (PD) website

<https://www.ufv.ca/hr/learning-and-development/professional-development-fund/>

Step 2: From the PD website, in the PD Application Process, click “PD application form” and it will open the HR Service Catalog ticketing system for you to access the PD form.

Application Process

There are two different types of application forms for Professional Development; one for Events & Tuition, and another form for Memberships & Resource Materials. All forms should now be submitted through TeamDynamix (TDX) system.

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the [in-service Professional Development criteria](#). If the direct supervisor is not an exempt administrator, then the application will require a second signature from the exempt administrator.

1) Submit application.

Fill out the applicable [PD application form](#) and submit it to your direct supervisor using this TeamDynamix (TDX) system.



Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 3: In the HR service catalog page, click the applicable PD application form that you need to complete and submit.

HR
Service
Catalog
page:

The screenshot shows the HR Service Catalog page for Professional Development. The header includes the University of the Fraser Valley logo, a search bar, and the user name Maria De Guzman. The navigation bar has links for Home, Projects, Services, and Knowledge Base. Below the navigation bar, there are links for Project Requests, Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, and Search. The main content area is titled "Professional Development" and includes an "Overview" section with text about engaging in PD activities and a link to the "UFV HR Professional Development Fund website". There is also an "Application Process" section with two steps: "1. Submit application." and "2. Receive approval for application." On the right side of the page, there are four green buttons: "Submit Events and Tuition Application Form", "Submit Memberships & Resource Materials Application Form", "Share", and "Add to Favorites". A red arrow points to the "Submit Memberships & Resource Materials Application Form" button. Below the buttons, there is a "Service Offerings (2)" section with two items: "PD Application Form - Events and Tuition" and "PD Application Form - Memberships & Resource Materials".

Employee: How to submit a PD application form using UFV's HR Service Catalog system



Step 4: Fill out the PD application form. **Example: Memberships & Resource Materials**

Home Projects Services Knowledge Base

[Service Catalog](#) / [Working at UFV](#) / [Professional Development](#) / [Professional Development](#) / [PD Application Form - Memberships & Resource Materials](#)

PD Application Form - Memberships & Resource Materials [+ Show Help](#) [- Hide Help](#)

Click on the "Memberships & Resource Materials Application Form" button and complete all required fields on the form.

All fields marked with an asterisk (*) are required.

Prior to completing and submitting this PD application form, please ensure that you have reviewed and discussed the proposed activity with your supervisor.

Name *

Applications for Professional Development must be submitted by the applicant directly, not on behalf of others.

Maria De Guzman

Department *

Department of the applicant

Human Resources

Employee ID *

123456789

Position Title *

PD Assistant

Direct Supervisor

PD applications must be reviewed and supported by the applicant's direct supervisor. If the applicant's direct supervisor is a non-exempt (unionized) supervisor, then the application will require a second signature from the applicant's exempt administrator.

ONLY fill out this field if your supervisor is a non-exempt employee and then enter your exempt administrator below.

Start typing...

Exempt Administrator *

Enter the applicant's exempt administrator's name in this field:

Nancy Scarrow

This field triggers the automatic approval workflow.

Employee: How to submit a PD application form using UFV's HR Service Catalog system

Step 4: Fill out the PD application form. [Example: Memberships & Resource Materials](#)

Home Projects Services Knowledge Base

Application Type *

☐ Professional Membership(s) ☐ Resource Materials ☒ Both

Formal name of Membership *

CPHR Professional Membership

Annual membership start date *

11/1/2025

Annual membership end date *

10/31/2026

Membership Cost *

500

Apply for a second membership? *

☐ Yes ☒ No

Rationale - Professional Membership(s) * ?

Clearly describe how the professional membership(s) meet the JPDC application criteria

<ENTER YOUR RATIONALE>

Note: Select what kind of PD application type you are requesting.

Employee has the option to apply for a "professional membership" and "resource materials" at the same time by clicking "Both"

Employee: How to submit a PD application form using UFV's HR Service Catalog system

Step 4: Fill out the PD application form. [Example: Memberships & Resource Materials](#)

[Home](#) [Projects](#) [Services](#) [Knowledge Base](#)

Resource Material *

Resource Book: Organizational Behaviour by Stephen P. Robbins and Timothy A. Judge

Resource Type *

Books

Cost of Item *

100

Add another resource material? *

☐ Yes ☒ No

Rationale - Resource Materials * ⓘ

Clearly describe how the resource material(s) meet the JPDC application criteria

<ENTER YOUR RATIONALE>

Resource Type *

Books

Exam handbook/practice material (for a college/university institution/certification/licensing)

Journals

Publication Fee (for faculty for their professional journal/articles)

Software

Subscription Fee i.e. annual fee (start date must be within current fiscal year)

Other

NOTE: Please ensure to convert all foreign currency to Canadian dollars using the Bank of Canada exchange rate.

- Applicant to meet and review with supervisor
- Application must be submitted and approved PRIOR to attending an activity or making a PD purchase
- Application must be complete, clear, legible and signed
- Applications must include all supporting documents related to request (brochures, course descriptions, membership details, link)
- It is the employee's responsibility to confirm funding availability with HR prior to incurring expenses
- Incomplete applications will not be processed and will be returned

Attachment * ⓘ

File attachments associated with the ticket. Please attach all supporting documents related to request. (e.g. brochures, course descriptions, event/membership/resource material details, links, advance request form if applicable, etc.)

Browse...

No file chosen

Additional Comments

Submit

Employee: How to submit a PD application form using UFV's HR Service Catalog system

Step 5: Review and click “Submit”. Example: Memberships & Resource Materials

[Home](#) [Projects](#) [Services](#) [Knowledge Base](#)

Resource Material *

Resource Type *

Cost of Item *

Add another resource material? *

☐ Yes ☒ No

Rationale - Resource Materials *

Clearly describe how the resource material(s) meet the JPDC application criteria

<ENTER YOUR RATIONALE>

NOTE: Please ensure to convert all foreign currency to Canadian dollars using the Bank of Canada exchange rate.

- Applicant to meet and review with supervisor
- Application must be submitted and approved PRIOR to attending an activity or making a PD purchase
- Application must be complete, clear, legible and signed
- Applications must include all supporting documents related to request (brochures, course descriptions, membership details, link)
- It is the employee's responsibility to confirm funding availability with HR prior to incurring expenses
- Incomplete applications will not be processed and will be returned

Attachment *

File attachments associated with the ticket. Please attach all supporting documents related to request. (e.g. brochures, course descriptions, event/membership/resource material details, links, advance request form if applicable, etc.)

No file chosen

Additional Comments



Employee's view: Confirmation of PD Form Submission notification



Step 6: Receive submission confirmation and email notification

HR Service
Catalog:



✓ Request Created Successfully!

Service Request ID: 2912966

What do you want to do now?

- [Create another request of this type](#)
- [View the request you just created](#)
- [View your ticket requests](#)

EMAIL:

TeamDynamix Service Request Created (PD Application Form - Membe...)



Maria De Guzman <notify-ca@teamdynamixapp.com>
To: Maria De Guzman

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Details

Maria De Guzman created this service request on Thu 11/6/25 3:44 PM Pacific Standard Time.

Service Request Created

Acct/Dept

Human Resources

ID

2912966

Type

PD Applications

Title

PD Application Form - Memberships and Resource Materials

Notified

Maria De Guzman <Maria.DeGuzman@ufv.ca>

Created By

Maria De Guzman

Direct supervisor / exempt administrator view:

How to view and approve a PD application

Step 1: Receive email notification on PD application form for approval.

Click “approval workflow step” and it will open the HR Service Catalog ticketing system for you to access the PD form for your approval.

Example: email notification to direct supervisor (non-exempt):

TeamDynamix Workflow Step Assignment (PD Application For Approval...)



Maria De Guzman <notify-ca@teamdynamixapp.com>

To: Maria De Guzman

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Workflow Step Assignment

You are assigned to the **"PD Application For Approval - Non-exempt supervisor"** Choice workflow step.

To act on this Choice step, click the link below:

[PD Application For Approval - Non-exempt supervisor Workflow Step](#)

Service Request Details

Service Request 2994533

PD Application Form - Memberships and Resource Materials

Notified

Maria De Guzman <Maria.DeGuzman@ufv.ca>

Acct/Dept

Human Resources

Requested By

Maria De Guzman

Example: email notification to exempt administrator:

TeamDynamix Workflow Step Assignment (PD Application For Approval...)



Maria De Guzman <notify-ca@teamdynamixapp.com>

To: Maria De Guzman

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Workflow Step Assignment

You are assigned to the **"PD Application For Approval - Exempt Administrator"** Choice workflow step.

To act on this Choice step, click the link below:

[PD Application For Approval - Exempt Administrator Workflow Step](#)

Service Request Details

Service Request 2994533

PD Application Form - Memberships and Resource Materials

Notified

Maria De Guzman <Maria.DeGuzman@ufv.ca>

Acct/Dept

Human Resources

Requested By

Maria De Guzman

Direct supervisor / exempt administrator view:

How to view and approve a PD application

Step 2: In the HR Service Catalog page, please review the instructions and click “PD Application Form” to view the requested PD for approval

(Please ensure that you review the PD form and have a discussion first with the applicant about the PD request PRIOR approving/not approving the PD application form.)

HR
Service
Catalog
page:

Current Workflow Step

Service Request Details

Service Request

2912986: PD Application Form - Memberships and Resource Materials



Choice Step Details

Step

Non-exempt supervisor's approval

Assigned To

Maria De Guzman

Description

You have received this PD service request because one of your employees in your department has submitted a PD application for your approval.

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the in-service Professional Development criteria - <https://tinyurl.com/rf4cuuww>

If the direct supervisor is not an exempt administrator, then the application will require a second signature from the employee's exempt administrator.

ACTIONS FOR YOU:

1. Review and discuss the PD application form in this service request with the employee. (To view the PD form, please click the PD application form located at the top of this service request page)

2. Approve/Not Approve this PD application by clicking the "Approved / Not Approved" button.

In approving the PD application, as the employee's direct supervisor, you are confirming that:

- A conversation took place with the employee prior to submission of the PD application. This is to ensure alignment of professional development to skill and knowledge development and/or a link to UFV career advancement and/or to bring value to UFV strategic goals.

We also ask supervisors to help employees explore cost-effective learning options that still meet the PD criteria. For

✓ APPROVED: MEETS the criteria for a satisfactory In-Service PD application.

✓ NOT APPROVED: Meets PD criteria but does not meet department's operational needs.

✓ NOT APPROVED: Does not meet criteria for satisfactory In-Service PD application.

↩ Re-send Notification

Requestor




Maria De Guzman

Maria.DeGuzman@ufv.ca

Direct supervisor / exempt administrator view:

How to view and approve a PD application

Step 3: Review the PD application form details. Go back to the previous page to approve/not approve.



https://itservicedesk.ufv.ca/SBTDClient/52/ITServicesPortal/Requests/TicketRequests/TicketDet?TicketID=tX8FX9IFyd0_

UFV.CA FUTURE STUDENTS INTERNATIONAL CURRENT STUDENTS ALUMNI

THIS IS A SANDBOX / TEST INSTANCE
TICKETS CREATED HERE WILL NOT BE ANSWERED
CLICK HERE TO VISIT PRODUCTION

Search the client portal Maria De Guzman

IT Services Home Projects Services Knowledge Base

Project Requests Ticket Requests My Favorites My Recent My Approvals Services A-Z Search

Services / Ticket Requests / PD Application Form - Memberships and Resource Materials

PD Application Form - Memberships and Resource Materials New

Service Request ID: 2912966

[Withdraw Request](#) [Add Attachment](#) [Add Alert](#) [To TDNext](#)

Details

Account/Department
Human Resources

Service
Professional Development / Professional Development

Service Offering
PD Application Form - Memberships & Resource Materials

Workflow
PD Applications

Current Workflow Step
Non-exempt supervisor's approval


Created Thu 11/6/25 3:44 PM by Maria De Guzman	Last Modified Thu 11/6/25 3:44 PM by Maria De Guzman
---	---

Employee ID
123456789


Position Title
PD Assistant

Direct Supervisor

Requestor

 [Maria De Guzman](#)
[Maria.DeGuzman@ufv.ca](#)
5133

Attachments (1) Sort By: Name Date +

 **TEST DOCUMENT FOR UPLOAD.docx**
Thu 11/6/25 3:44 PM [Maria De Guzman](#)

Drag and drop attachments here to upload.
A maximum of 4 MB can be uploaded at once.

Read By (1)

[Maria De Guzman](#) Thu 11/6/25 3:44 PM

Direct supervisor / exempt administrator view:

How to view and approve a PD application

Step 4: Approve/not approve the PD application form by clicking the “approved/not approved” buttons.

Current Workflow Step

Service Request Details

Service Request

2912988: PD Application Form - Memberships and Resource Materials

Choice Step Details

Step

Non-exempt supervisor's approval

Assigned To

Maria De Guzman

Description

You have received this PD service request because one of your employees in your department has submitted a PD application for your approval.

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the in-service Professional Development criteria - <https://tinyurl.com/rf4cuuuw>

If the direct supervisor is not an exempt administrator, then the application will require a second signature from the employee's exempt administrator.

ACTIONS FOR YOU:

1. Review and discuss the PD application form in this service request with the employee. (To view the PD form, please click the PD application form located at the top of this service request page)

2. Approve/Not Approve this PD application by clicking the "Approved / Not Approved" button.

In approving the PD application, as the employee's direct supervisor, you are confirming that:

- A conversation took place with the employee prior to submission of the PD application. This is to ensure alignment of professional development to skill and knowledge development and/or a link to UFV career advancement and/or to bring value to UFV strategic goals.

We also ask supervisors to help employees explore cost-effective learning options that still meet the PD criteria. For more information on the PD criteria, please visit this link for the in-service Professional Development criteria - <https://tinyurl.com/rf4cuuuw>

- The PD Application Form in this service request has been reviewed, and the information is accurate.

- Departmental operational needs will not be adversely affected by approving the PD application.

✓ APPROVED: MEETS the criteria for a satisfactory In-Service PD application.



✓ NOT APPROVED: Meets PD criteria but does not meet department's operational needs.



✓ NOT APPROVED: Does not meet criteria for satisfactory In-Service PD application.



↻ Re-send Notification

Requestor



Maria De Guzman

Maria.DeGuzman@ufv.ca

Direct supervisor / exempt administrator view:

How to view and approve a PD application


Step 5: Add a comment and click “Save” to submit and receive confirmation of your approval.

Project Requests Ticket Requests My Favorites My Recent My Approvals Services A-Z Search

Current Workflow Step

APPROVED: MEETS the criteria for a satisfactory In-Service PD application.

Comments

 Save Cancel



Example: confirmation of approval

Project Requests Ticket Requests My Favorites My Recent My Approvals Services A-Z Search

Step updated.

Current Workflow Step

Service Request Details

Service Request
2912989: PD Application Form - Memberships and Resource Materials

Choice Step Details

Step
Non-exempt supervisor's approval


Status
✓ APPROVED: MEETS the criteria for a satisfactory In-Service PD application. on Thu 11/8/25 4:14 PM

Assigned To
Custom Attribute - Non-Exempt Supervisor

Description
You have received this PD service request because one of your employees in your department has submitted a PD application for your approval.

This workflow step is not current. The step may have already been completed.

History

 **Maria De Guzman**
✓ APPROVED: MEETS the criteria for a satisfactory In-Service PD application.
Thu 11/8/25 4:14 PM

Note:

If it is felt that an application does not meet the PD criteria, the supervisor / exempt administrator may decline to support the application. This should be discussed with the employee first and you will be required to provide your full rationale in the comment section after clicking “Not Approved”.

Scroll down to see your approval history

Employee, direct supervisor, exempt administrator's view: Final Approval Notification to Employee from HR



Example: PD approval email notification

TeamDynamix Service Request Updated (PD Application Form - Membe...)



Maria De Guzman <notify-ca@teamdynamixapp.com>

To: Maria De Guzman

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

What Changed

Maria De Guzman updated this service request on Thu 11/6/25 4:25 PM Pacific Standard Time.

Comments: Changed Status from **New** to **Closed**.

Changed PD Approval Number (ADELE) from "Nothing" to "26-1234".



Hi Maria,

This email is to confirm that your activity has been reviewed in HR, and you are able to proceed with the activity - please see assigned **PD Approval Number(s)** included:

PD# 26-1234 – CPHR MEMBERSHIP (\$100.00 APPROVED)



Refer to the Professional Development website [page](#) for allowable expenses, general information and expense claims or email us at in-service_pd@ufv.ca

Note:

- For approved PD activities involving international travel, please contact UFV International at StudyAbroad@UFV.ca to discuss UFV's policies, procedures, and best practices surrounding international travel [international travel guide for employees](#).
- If your expense includes airfare, hotels, or car rentals, please do so through UFV's travel provider, Direct Travel. For more information visit: <https://www.ufv.ca/finance/travel>
- Once your activity is complete, please submit your expense report through **Emburse Enterprise EMS (Previously called "Chrome River")**, our new expense management system. Access information and instructions [here](#).
- Upon completion of any conferences, workshops, trainings, courses, and events, you are required to submit a **post-PD report** to your supervisor for review and signature and a copy must be sent via email to in-service_pd@ufv.ca.

(Below can be a link with the separate attachment on QRG-User Guide)

Emburse Enterprise Access and Instructions:

Emburse can now be accessed [here](#), and through the card in myUFV. To find the card in myUFV, click on the three lines next to the myUFV logo and select Work/Employee. If the card does not show up on the screen, contact HR.

You can find instructions on how to use Emburse Enterprise [here](#).

When creating a PD Expense Claim, make sure you:

- Select the "PD Expense Claim" as the Expense Report Type, and in the PD Approval Number field, put the applicable PD# (for example: PD#25-1-0001)
- Select "PD Professional Development" as the Allocation
- Add your name in the second box/field of the Allocation area for all expenses where you are the sole beneficiary of items/services purchased. Like Conference Fee, Mileage, Meals, etc.
- Add an expense for each receipt and do not gather items under one expense if they each have their own receipt (for example with books, even if they are the same category, if they have the same receipt)
- If receipt does not show the method of payment, please attach supporting document showing method of payment like bank statement or visa/credit card machine receipt as we must have proof of payment.

- ☐ Review the in-service professional development (PD) website which details the PD overview, criteria, guidelines, application process, forms, eligible expenses, etc. to become familiar with the PD application requirements, processes, and ensure all steps are followed.
- ☐ Prior to completing and submitting a PD application form, please ensure that you have reviewed and discussed the proposed activity with your supervisor.
- ☐ Application must be submitted and approved PRIOR to attending an activity or making a PD purchase.
- ☐ Application must be complete, clear, legible and signed in HR Service Catalog system.
- ☐ Application must include all supporting documents related to request (e.g. brochures, course descriptions, event/membership/resource materials details, links, etc.).
- ☐ It is the employee's responsibility to confirm funding availability with HR prior to incurring expenses.
- ☐ For PD activities involving international travel, please contact UFV International at StudyAbroad@UFV.ca to discuss UFV's policies, procedures, and best practices surrounding international travel. General information is available online via [UFV's international travel guide for employees](#)
- ☐ If the employee decides to cancel a submitted or approved PD application, the employee should cancel the PD application in HR Service Catalog system and add a comment in HR Service Catalog system for the reason of cancellation and discuss this with the employee's direct supervisor for information and awareness.
- ☐ If the employee decides to change some information from their submitted or approved PD application, the employee should add a comment to their PD application in HR Service Catalog system and discuss this with their direct supervisor for information and awareness.
- ☐ Best practice would suggest employees to take ownership and monitor their submitted PD applications, available PD funds, and PD claims to ensure compliance and accuracy.

**Employee's
responsibilities
as a submitter /
applicant**

Direct supervisor / exempt administrator's responsibilities as approver



As a direct supervisor, what is my role in reviewing and approving PD applications?

All PD applications must be submitted to an employee's direct supervisor for review and confirmation that the request meets the in-service Professional Development criteria. If the direct supervisor is not an exempt administrator, then the application will require a second signature from the exempt administrator. If it is felt that an application does not meet the criteria, the supervisor / exempt administrator may decline to support the application.

If an application meets the criteria, it may still be declined if it is determined that the leave would disrupt the operation of business at UFV (staff shortages, peak operational periods, critical projects or tasks, customer or client impact, etc.) Practical/reasonable logistical adjustments to accommodate PD activities are expected.

NOTE: all applications that are declined must include full rationale from the supervisor/exempt administrator for their decision when submitted.

All applications must be submitted to in-service PD whether they are supported by the supervisor or not. The PD Assistant will send the final approval or rejection notice to the employee once reviewed.

Direct Supervisor / exempt administrator's responsibilities as approver



Things to consider when reviewing PD applications:

- ☐ How will this activity contribute to the professional development of the employee and how will it directly link back to UFV?
- ☐ In what specific way will the activity develop or upgrade the employee's UFV job-related skills?
- ☐ What is the relationship between the activity and current or near future employment opportunities for this employee at UFV?
- ☐ How is the activity of value to the institution?
- ☐ Has the employee explored all cost-effective learning options that may be offered locally or online?
- ☐ How will the activity further UFV's strategic goals?
- ☐ Is the activity a requirement of the department or position? If so, then the activity is NOT an approvable professional development application and should be funded through the employee's department.



List of Frequently Asked Questions (FAQs)

- How can I check my PD allocation balance and expenditures?
- What types of activities have employees been doing this year?
- Which fiscal year will my PD fund allocation be used? For example, I will pay the conference registration fee in February 2026, but the actual conference date is happening in May 2026.
- I have unused PD funds from last fiscal year; can I carry over or use it in the next fiscal year?
- How do I know if my direct supervisor is an “exempt” or “non-exempt” supervisor?
- How do I cancel my submitted or approved PD application?
- Where can I view my submitted PD application to track the status?
- How do I make changes to my PD application submission or add a comment?
- How can I attach additional supporting documents to my PD application? I see it only allows me to attach one.
- How do I submit my post-PD report? Is it through this online system or pdf fillable form?
- As an approver, where do I go to view the PD application that I approved?
- I have questions related to PD, to whom can I ask for support?

(Please see next slides for the answers to the FAQs)



➤ **How can I check my PD allocation balance and expenditures?**

- Log in to my.ufv.ca
- Click “Work/Employee” Info tab
- Scroll down and search for the “PD and DTA History” card and click “View Details”
- Select the relevant fiscal year to view your PD allocations and expenses

If you are not a permanent employee, please contact PD Assistant email: in-service_pd@ufv.ca, who will be able to provide you with your PD allocation.

➤ **What types of activities have employees been doing this year?**

- To see the list of activities that employees have been reimbursed for, please refer to this document: [Listing of Professional Development Activities](#)

➤ **Which fiscal year will my PD fund allocation be used? For example, I will pay the conference registration fee in February 2026, but the actual conference date is happening in May 2026.**

- The PD funds will come from the fiscal year in which the activity takes place. The actual date of the activity/event dictates which fiscal year of PD funds get used.

For example, the actual conference date is happening in May 2026, the PD funds that will be used for this is fiscal year 2027 (April 01, 2026 to March 31, 2027).



- **I have unused PD funds from last fiscal year; can I carry over or use it in the next fiscal year?**
 - No carryover of unused PD funds from one fiscal year to another.

- **How do I know if my direct supervisor is an “exempt” or “non-exempt” supervisor?**
 - Prior to completing and submitting an online PD application form, please ensure that you have reviewed and discussed the proposed activity with your direct supervisor. This will help you to clarify if your direct supervisor is an “exempt (non-unionized)” or “non-exempt (unionized)” supervisor/administrator.

 - If your direct supervisor is “non-exempt” supervisor, then the application will require a second signature from the exempt administrator. To know who is your “exempt administrator”, please ask your non-exempt supervisor.

- **How do I cancel my submitted or approved PD application?**

If you decide to cancel your PD application, please discuss this with your supervisor, then notify HR by:

 - Go to the ticket homepage: <https://itservicedesk.ufv.ca/TDClient/52/ITServicesPortal/Requests/TicketRequests/>
 - Search and click your submitted PD application form
 - Add a comment indicating your cancellation reason
 - Click “Withdraw Request” and “Save”

Note: If you submitted and received PD approval using the old pdf form process, then please notify HR about the cancellation by sending an email to in-service_pd@ufv.ca



➤ **Where can I view my submitted PD application to track the status?**

- To monitor the status of your submitted PD application, please do the following:

Option 1:

- go to ticket homepage: <https://itservicedesk.ufv.ca/TDClient/52/ITServicesPortal/Requests/TicketRequests/>
- search and click your submitted PD application form.
- In your PD application, click “Current Workflow Step” to see its status and who it is currently assigned to.

Option 2:

- In your UFV email, search for the email notification on your submitted PD application.
- Open the email, scroll down, and click “Open in TDClient” to open your application.
- In your PD application, click “Current Workflow Step” to see its status and who it is currently assigned to.

Once your PD application form has been approved by the required signatories. HR will review your application and once approved, you will receive an email from HR with the PD approval number and instructions on how to get reimbursed.



➤ **How do I make changes to my PD application submission or add a comment?**

Option 1:

- go to ticket homepage: <https://itservicedesk.ufv.ca/TDClient/52/ITServicesPortal/Requests/TicketRequests/>
- search and click your submitted PD application form.
- In your PD application, scroll down, add a comment about the required change or information, then click Save.

Option 2:

- In your UFV email, search for the email notification on your submitted PD application.
- Open the email, scroll down, and click “Open in TDClient” to open your application.
- In your PD application, scroll down, add a comment about the required change or information, then click Save.

➤ **How can I attach additional supporting documents to my PD application?** **I see it only allows me to attach one.**

Option 1:

- go to ticket homepage: <https://itservicedesk.ufv.ca/TDClient/52/ITServicesPortal/Requests/TicketRequests/>
- search and click your submitted PD application form.
- In your PD application, click “Add Attachment”, browse for your file, then click “Upload” and you can see your uploaded file under “Attachments”

Option 2:

- In your UFV email, search for the email notification on your submitted PD application.
- Open the email, scroll down, and click “Open in TDClient” to open your application.
- In your PD application, click “Add Attachment”, browse for your file, then click “Upload” and you can see your uploaded file under “Attachments”



- **How do I submit my post-PD report? Is it through this online system or pdf fillable form?**
 - Submit your post-PD report (for conferences, workshops, courses, trainings, and events) using the fillable post-PD report in pdf format. Have it reviewed and signed by your direct supervisor first and email it to in-service_pd@ufv.ca.

- **As an approver, where do I go to view the PD application that I approved?**
 - In your UFV email, search for the email notification on “PD application for your approval”.
 - Open the email and click the workflow step link (PD Application For Approval Workflow Step) to view the PD application form on this service request.

- **I have questions related to PD, to whom can I ask for support?**
 - For questions regarding the in-service professional development fund and process, contact the Professional Development Assistant at email in-service_pd@ufv.ca or at local 5133.
 - If you are experiencing access related issue on the HR Service Catalog ticketing system, please contact IT Service Desk at this link: <https://itservicedesk.ufv.ca/TDClient/52/Portal/Requests/ServiceDet?ID=451>

A large, stylized green leaf graphic that curves from the left side of the slide, under the "Thank you!" text, and extends towards the bottom right corner.

Thank you!