# CUPE Professional Development Expense Fund (PEF) Frequently Asked Questions

## What is the CUPE Professional Development Expense Fund (PEF)?

The CUPE Professional Development Expense Fund offers support through reimbursement of professional expenses for **professional development purposes** (including research, travel, and professional skills development).

## Why am I receiving a PEF Statement?

As per Appendix C of the CUPE 1 Collective Agreement, each employee, with an amount of accumulated PD expense monies, shall be notified of the amount in February of each year.

If you have any questions regarding this statement or your CUPE Professional Development Expenses Fund, please contact Office of the Dean of Arts and Science DeanArtsScience@trentu.ca.

## What is eligible for reimbursement?

You can submit reimbursements for conference attendance (including travel, accommodation, and food costs), research (including books, editors, and publication fees), hardware to facilitate remote delivery and online course components, professional skills development (i.e. course fees and related costs associated with the general development of professional skills in the areas of research, teaching, etc.).

Reimbursements will not be granted for expenses incurred as part of work-related duties.

### Limitations

* Reimbursements will not be granted for the costs of degree or diploma-related courses.
* Reimbursements will not be granted for the costs of licenses and memberships required for non-Trent employment (e.g. Police Record Checks and First Aid Certification)
* Non-degree or non-diploma courses, conferences, research, and professional skills development will all be valued equally in regard to expense reimbursement.
* You are eligible to purchase hardware or equipment to help facilitate your remote delivery and online components of your courses. This includes computers or printers. However, hardware and equipment are required to be returned to Trent, as they become the property of the University.
* Reimbursements will not be granted for the cost of passport fees and renewals.
* Reimbursements will not be granted for internet and cell phones.
* Parking fees as part of travel cost to attend conferences are eligible expenses for reimbursement. Reimbursement will not be granted for parking costs incurred for attending work and duties related to your CUPE position.

## How many times per year can I submit a claim?

Members may submit up to two claims per fiscal year (May 1 to April 30) to the Deans’ Office for processing.

## I don’t currently work for the University. Can I still submit a claim?

Eligible members can accrue professional development expense funds for a period of up to 24 months from the term in which it was earned. With the supporting receipts, members can submit a claim through Chrome River while they have the funds available.

## How do I submit a claim?

PEF claims are submitted using Chrome River. To find Chrome River, login in to myTrent, click on Finances in the top right corner, and select the icon Chrome River. To start your expense report (claim), click the create button associated with ‘Expenses’.

Select the report type “Professional Expense Funds (PEF) / Relocation” when starting a PEF claim. Select FY24 for the fiscal year when creating claims in Chrome River (May 1, 2023 to April 30, 2024). You will need to enter the CUPE PEF allocation account, 10-61771.

Receipts must be listed individually within each claim. Add the first receipt (and its supporting details) to your claim, and then select the (+) at the right side of the blue ‘Expenses’ header to re-open the receipt categories and add your next expense. Once you have saved a receipt to the claim, it will appear in a list on the left side of the claim with the total claim amount at the bottom of the screen. Once you have added all receipts, click on ‘Submit’ to send your expense report to the Deans’ Office for review and approval. Each expense report submitted is considered one of your two allocated PEF claims for the year.

### Conditions:

* Orders without confirmation of payment are not adequate, proof of purchase or approval of transaction must be included.
* Receipts for conferences/events and travel may only be submitted for reimbursement after the event and/or travel has occurred.
* If including meals at restaurants in your PEF claim, the itemized receipt must be included with the approved transaction receipt (this does not apply for meals per diem).
* Alcoholic drinks must be excluded from the requested amount to be reimbursed in PEF Claims.
* For any purchases made via credit card, you need to attach the receipt and the credit card statement with the expense listed. The only information needed from the statement is your name, the bank headers, and the line item of the expense being claimed. The rest can be redacted.

For assistance submitting claims to Chrome River, please visit the following guides made by Accounts Payable:

[How to Claim an Expense Reimbursement.pdf (trentu.ca)](https://www.trentu.ca/financialservices/sites/trentu.ca.financialservices/files/documents/How%20to%20Claim%20an%20Expense%20Reimbursement.pdf)

[FAQ's - Guide to Claiming an Expense Reimbursement\_0.pdf (trentu.ca)](https://www.trentu.ca/financialservices/sites/trentu.ca.financialservices/files/documents/FAQ%27s%20-%20Guide%20to%20Claiming%20an%20Expense%20Reimbursement_0.pdf)

## What tile in Chrome River do I use for my expense?

For the “Professional Expense Funds (PEF) / Relocation” report type, there is a curated selection of expense category tiles to choose from. Some of the expense categories are not eligible for reimbursement under the CUPE PEF. Please review the list below:

* **Travel:** used for any expenses incurred while travelling for professional development business and a receipt is required. There are three options to select from:
	+ Domestic Transportation: all transportation costs incurred within Canada such as airfare, train/rail, and car rental.
	+ International Transportation: all transportation costs incurred outside of Canada such as airfare, train/rail, and car rental.
	+ Other Travel Costs: all other travel-related expenses not outlined above. Includes fuel, public transit, cab and bus fares, parking, tolls, hotels, receipted meals, and conference/seminar.
* **Meals – Per Diem**: by using the Per Diem Wizard, meal allowance rates are automatically calculated, and no receipt is required.
* **Mileage**: by using the Google Maps functionality your mileage will be calculated for you and no receipt is required. Only eligible for reimbursement under the CUPE PEF if the mileage cost was incurred as part of professional development or research, not to preform work-related duties.
* **Mobile / Cellular & Internet**: Not eligible for reimbursement under the CUPE PEF.
* **Computer Purchase**: used to claim desktop computers, laptops, iPads, and tablets. Please note, equipment reimbursed by the PEF becomes property of the University.
* **General Supplies**: used for all non-travel, computer purchases or books expenses. Includes costs for professional membership dues, subscriptions, software, and other materials required.
* **Books / Publications**: used for the purchase of books and expenses incurred in publishing scholarly research.
* **Relocation**: Not eligible for reimbursement under the CUPE PEF.

## Additional Information

For more details about the CUPE Professional Development Expense Fund, please check out Appendix C of the CUPE 1 Collective Agreement (draft available on the [Labour Relations page of the Human Resources website](https://www.trentu.ca/humanresources/human-resources-services/labour-relations)).