



PD Admin Only (17/18 yr) Claim # \_\_\_\_\_

FTE: Reference # \_\_\_\_\_

FMS Ready

Emailed/Follow up:

### STAFF PROFESSIONAL DEVELOPMENT FUNDING REIMBURSEMENT CLAIM FORM

Employment Group:  CUPE 116  CUPE 2950  Exec Admin  Non Union TRA  M&P  SUD/Excluded M&P  
Check your PD Fund eligibility and balance through the [Faculty & Staff Self-Service](#) portal prior to claim submission

Employee Name: \_\_\_\_\_ Employee ID Number: \_\_\_\_\_

Department: \_\_\_\_\_ Job Title: \_\_\_\_\_

Work Email: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**Provide a description and the dates of your professional development activity and briefly explain how the activity will enhance the knowledge, performance or career progression of your work at UBC (required):**

PD FUND EXPENSES:						
PAID DATE* (mm/dd/yyyy)	TYPE OF PD ACTIVITY	LEARNING PROVIDER OR SUPPLIER	TOTAL EXPENSE AMOUNT** (CDN\$)	PD FUNDCLAIM AMOUNT** (CDN\$)	PD Admin Only	
					Amount Approved	G S T
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
<b>TOTAL REIMBURSEMENT REQUESTED:</b>				<b>\$</b>	<b>\$</b>	

\* Please submit application within 60 days of date of PD purchase

\*\* Foreign Currency: Indicate amount in Canadian funds and provide proof of exchange

TYPES OF PD ACTIVITIES INCLUDE:	REIMBURSEMENT OPTION - Please check one
<p><b>Typical activities:</b> Books, Certification, Coaching, Conference, Course, Exam, Meeting, Professional Membership, Seminar, Subscription, and Workshop</p> <p><b>Non-local Travel:</b> Accommodation, Airfare, Car Rental/Taxi, Meals, Mileage, Parking and Public Transportation (reimbursed as per <a href="#">UBC Travel Policy 83</a> &amp; <a href="#">Administrative Directive</a>)</p> <p>Please refer to your applicable PD Fund Guidelines for further details.</p>	<p><input type="checkbox"/> Reimburse Me (by direct deposit)</p> <p><input type="checkbox"/> Reimburse My Department (by Journal Voucher transfer)</p> <p>Credit to:</p> <ol style="list-style-type: none"> <li>Department SpeedChart: _____</li> <li><a href="#">Expense Account(s)</a>: _____</li> <li>Department Finance contact email: _____</li> </ol> <p>Please see second page for required supporting documents, employee signature and manager approval</p>

Employee Name: \_\_\_\_\_

Employee ID Number: \_\_\_\_\_

**REQUIRED SUPPORTING DOCUMENTATION: check all that apply**

**Requirements for all claim submissions:**

- Proof of payment (*original receipt or statement of account showing zero balance*)
- Proof of registration (*showing name, name of course/membership/etc. and dates*)
- All **non-local travel** expenses claimed require proof of registration in the relating PD activity
- Proof of exchange rate for any PD activity paid for in foreign currency (*credit card payment details*)

**Also, all department reimbursements** require proof of UBC payment, along with copies of above documents (*copy of General Ledger transaction detail, or UBC credit card statement, or Q-Req/Travel-Req, or JV, or OPT summary*)

**EMPLOYEE CONFIRMATION:**

I confirm that the information provided in this application is complete, correct and that I have not and will not claim reimbursement for these expenses from any other source. Should I choose not to participate in this activity, for any reason, I will advise Human Resources PD Funding.

Dated: \_\_\_\_\_ Signed: \_\_\_\_\_

**UBC MANAGER OR SUPERVISING FACULTY MEMBER APPROVAL:**

I confirm that, as per the applicable [PD Fund Guidelines](#), this application is eligible for professional development funding.

Dated: \_\_\_\_\_ Signed: \_\_\_\_\_

Name of Manager: (please print) \_\_\_\_\_ Title: \_\_\_\_\_

**SUBMISSION INSTRUCTIONS:**

Please submit your completed claim form along with **all** required documents either by campus mail or in person, Mon-Fri, 8:30 to 4:30 to:

PD Funds, Human Resources,  
[6th Floor, 6190 Agronomy Road, TEF III,](#)  
Vancouver, BC V6T 1Z3

You can check your PD Fund balance and claim details through the [Faculty & Staff Self-Service](#) portal. After you sign in, click on the "Staff PD" tab to view your PD Fund details.

Review PD Fund Administrative Guidelines: <http://www.hr.ubc.ca/learning-engagement/leading-learning/pd-funding/>

Contact: email us at [pd.funds@ubc.ca](mailto:pd.funds@ubc.ca) or call 604-822-6314.

**Authorization (for PD Admin use only):** charge EE group PD Fund default speedchart and account 654000

I  approve  do not approve, as per the [PD Fund Guidelines](#), this application for professional development funding.

Dated: \_\_\_\_\_ Signed: \_\_\_\_\_

PD Admin Name: \_\_\_\_\_

Notes:

You can also supplement your PD activities with [lynda.com's](#) online learning resources. Visit [lynda.ubc.ca](http://lynda.ubc.ca) to learn more about free access for UBC staff & faculty.