

Professional Expense Reimbursement Guidelines

To be eligible for reimbursement:

1. The claimant must have made expenditures and received the goods and/or services purchased, except in the case of pre-paid travel expenses wherein the traveler may request an advance payment or where the purchase can be made directly using a University Purchasing Card;
2. Expenditures must not constitute a taxable benefit to the claimant; they must relate directly to the claimant's responsibilities for teaching, research and professional duties at Carleton University;
3. Expenditures must represent a good allocation of University resources and be reasonable in amount in the circumstances;
4. Appropriate original receipts or other original evidence of payment must support claims and reconciliations and may be retained by the University;
5. Expenditures will be in the general nature of:
 - a. Books, journals, subscriptions, membership dues, equipment, instruments, materials, supplies or services (on the express understanding that items of a physical nature with a continuing value are being purchased on behalf of the University and remain the property of the University when the staff member leaves);
 - b. Tuition or other fees for professional training courses, as evidenced by the original official tax receipt;
 - c. Travel or local expenses related to meetings or research activities that are in accordance with general University travel rules.

On each May 1, the unspent portion of each claimant's fund will be carried over to the next academic year provided that the total does not exceed three (3) years' entitlement. Any excess at May 1 will be permanently removed and transferred to the CUASA Scholarship Fund. Amounts transferred to an individual's Professional Expense Reimbursement fund from a Professional Achievement Award shall not count towards the maximum entitlement permitted to be carried forward.

Any employee who takes leave of absence without pay as in Article 20.1, of one hundred and eighty (180) days or more during the twelve (12) month period commencing May 1 and ending April 30 shall have his/her annual entitlement prorated and may only use the prorated sum.

Claims may be submitted at any time using the online at www.carleton.ca/travel.

Claims for travel related costs must be submitted using the online Travel and Expense Reimbursement system at www.carleton.ca/travel. Reports on travel advances must be submitted within 10 days of the return date.