



15 December 2017

MEMORANDUM

From: UPEIFA Communications Committee

RE: PDTR Claims

Following a number of complaints from Members of the Faculty Association, the Association grieved the Employer's handling of some recent PDTR claims. More specifically:

- the Employer's recent deviation from past practice where members could claim expenses actually incurred in advance of travel (for example, flights, conference registration, etc.). *Note:* this is not a travel advance of anticipated expenses through PDTR; rather, a reimbursement of costs actually expended.
- the Employer's demand for proof of travel (for example, boarding passes, conference badges, etc.) when hotel costs weren't being claimed (which confirmed proof of travel).

We are pleased to convey the terms of resolution for the grievance, which are as follows:

- the Employer will return to past practice concerning PDTR and reimburse for expenses actually incurred in advance of travel, in accordance with the Collective Agreement
- Association Members will need to provide proof of travel after the fact. Hotel receipts, boarding passes, taxi receipts, meal receipts or any similar item will suffice. This proof is required under Canada Revenue Agency criteria.

If Members request reimbursement from PDTR for costs actually incurred in advance of travel, the following steps are necessary:

- Complete a UPEI Travel Advance form (www.upei.ca/finance/accounting/forms)
 - Select box "E: in the One-Over-One Authority
 - Follow instructions at the bottom of the form for submission to Financial Services
- Once travel is complete, complete a Travel Report (See Travel Policy section 5.4)
 - It is at this step that proof of travel will need to be documented

On behalf of Association Members, we thank Laurie McDuffee, Grievance Officer, and Mike Arfken, Chief Grievance Officer, for their work and achievements.

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