

Guide Lines for OSSTF PD Reps and Branch Presidents**OSSTF PD Fund Reimbursement Claims Procedure Requirements****Supporting Documentation Required for Reimbursement:**

- **Original receipts are always required**, clearly showing what was purchased, that the total amount **has been paid** and all taxes that may be included in the charge.
- *When an original receipt is required for warranty purposes, it will be returned at that time, as needed.*
- A credit card chit or slip alone is not sufficient documentation for the purchase.
- Order forms alone, renewal notifications, etc., as substantiating documentation is also not sufficient, as "proof of payment" is necessary.
- When ordering via internet, the confirmation email or final page which would show the amount paid (& how) along with the purchase detail pages, is acceptable documentation. This includes on-line orders with Amazon or Chapters.
- If placing an order by phone, you must confirm with the vendor that an invoice/receipt marked paid, will be included in your package when shipped.
- Unusual purchases need additional information provided. A clear description of item(s), claimant's position with the Board and reason for granted approval, as it relates to the position held.
- Claims for conference registration, workshops/event fees, should not be submitted until after the event date, to ensure reimbursements are given only for events that have been attended.

Other important information:

- **Reimbursement claims cannot span into another school year.** Tuition fee partial payments are the exception.
- PD chair persons should ensure that the amount approved for reimbursement is clearly indicated, when different from the total amount of receipts, so that no payment errors can be made and time is spent productively.
- **Claim forms must be signed by:**
 - a/ The teacher
 - b/ School PD chair
 - c/ Principal at the site from which the claim is being made.
- **If a future "top-up" claim is anticipated, care should be taken to ensure a copy of all documents is retained in your file. This will be needed at the time of top-up submission, closer to the end of the school year, in June.**
- Reimbursements may be delayed if needed to be returned due to incomplete submissions. This is especially important as we draw close to the end of June and school summer closure. Requests received in the month of July that are not correct, will have no means of review and cannot be paid until staff return in September.

TOP-UP CLAIMS

Claim copies of the first submission are acceptable, provided that they also include the original receipt copies, attached. (to indicate that the original receipts have already been sent and referencing first payment batch number, is not sufficient.) Again, the amount to be paid must be clearly indicated on these subsequent claims.

Must have **original Principal signature**. A photocopy of the original claim with the total claim amount changed is not acceptable, as it is. **The PD chair and Principal have given their approval on the first claim amount and all subsequent requests for additional funds must also have an original signature.**