

**ACADEMIC ADVISING CENTER  
GUIDELINES FOR PROFESSIONAL DEVELOPMENT ACCOUNTS  
2010-2011**

The Advising Center has established a Professional Development Account in the amount of \$1000 for each *eligible* faculty member who serves as a premajor advisor for the academic year September-May, 2010-2011.

Eligible advisors are those faculty members whose primary appointment is instructional, ***and who are assigned their advisees through the Academic Advising Center.*** Eligibility extends to adjunct and to part-time faculty, as well as to full-time tenured faculty or faculty on tenure track. Faculty and staff members who advise through the Cornerstone, Faculty Topics, Perspectives Advising Sections, Courage to Know, FWS Advising Sections and Honors programs are *not* eligible for Professional Development Accounts, nor are individuals whose primary University appointments are administrative.

Please familiarize yourself with guidelines for the use of Professional Development Accounts.

(1) **\$500** will become available to each eligible faculty member on **October 1**, and an **additional \$500** will become available on **February 1** for all eligible advisors except those who leave the program at the end of the fall term. *Unused funds may carry over from the fall to the spring semester but any funds unexpended by May 20, 2011 will be forfeited.*

(2) Funds are paid as ***reimbursement for professional expenses, upon presentation of appropriate receipts and other documentation.*** In general, reimbursement will be available for items which could otherwise legitimately be claimed as professional expenses on Form 2106 of an employee's Federal tax return. Examples of "qualifying" expenses include travel and other expenses directly related to attendance at professional meetings; professional memberships and subscriptions in the faculty member's own or a demonstrably related field; purchase of books, microfilm, CDs, or other related materials related to a faculty member's teaching or research; travel for research directly connected with a specific, ongoing, project; purchase of equipment directly related to ongoing research or professional responsibilities. Most faculty members are familiar with such guidelines. Because of potential tax consequences for both individual faculty and the University, *reimbursement will be denied for expenses not meeting these criteria.* Thus (and this is a "real" example) expenses for purchase of recreation room furniture would be denied even if a faculty member claimed that such furniture increased his/her comfort level in leaving children with a caretaker for longer hours in order to meet advising obligations. Purchase of furniture for a home office would also be denied, since the University provides workspace for faculty within its buildings. Due to the complexities of the Federal tax code, expenses for childcare cannot be covered by professional development accounts, nor can travel-related expenses for spouses, partners, or children. ***Any advisor in doubt about whether a particular expense can be reimbursed should***

*confer with Ms. Stella Primpas before committing to the expense.* Prior consultation will help prevent disappointment, misunderstandings, and potential financial hardship.

(3) Funds are disbursed as **reimbursement**, not as “travel advances” or as payments for anticipated expenses. We can’t make exceptions to this policy, so advisors should plan accordingly.

(4) After incurring an expense, advisors should download the new PDF reimbursement request from the Advising Center www site, complete the form electronically, attach *original* receipts, and submit the form and receipts to Ms. Stella Primpas in the Academic Advising Center. Advisors should be certain to retain copies of all materials (including receipts) submitted. Requests will be processed promptly, but no guarantee can be offered that reimbursement will be received (for example) before particular credit card bills fall due. Again, advisors should plan accordingly.

(5) Processing reimbursements takes time and paperwork. Out of consideration for the Advising Center staff, we urge advisors to avoid submitting multiple small requests (\$20 to reimburse supplies purchased at Staples, for example, followed a week later by a separate request to reimburse \$55 of book purchases from Amazon.com, followed in two weeks by \$85 to reimburse for a professional membership). If items are purchased on-line with Amazon, (i.e.), proper download of “order summary” sheet showing both the **form of payment** (showing the last 4 digits of credit card) and **shipping date** is crucial. Receipts submitted should be original and “look-like receipts” not just showing the item. In reference to Advisor/Advisee luncheons please submit original receipts, signed form, and include names of all advisees attending. Any receipts for reimbursement beyond May 20, 2011 will not be accepted. A little planning will make things easier for everyone.

(6) Experience over many years in several universities confirms that reimbursements paid through Professional Development Accounts are not taxable to advisors who receive them. It goes without saying that expenses reimbursed through Professional Development Accounts are not deductible on employees’ Federal or State income tax returns. *Any faculty member with questions about the tax status of any reimbursement should, of course, consult his or her personal tax advisor.*