ACADEMIC STAFF ORIENTATION PACKAGE

NASA

NAIT ACADEMIC STAFF ASSOCIATION

2019-2020

NAIT AED Locations

NAIT Main Campus AED Locations

NORTH

HET

118 AVENUE

106 STREET

105 ST

104 ST

103 ST

103 STREET

PARKADE Q

V

N

B

C

SECURITY D

T

GYM

E

NAITSA

J

H

G

F

ARENA/POOL

S

BOOKSTORE

X

SHAW THEATRE

ERNESTS FRESH EXPRESS

MCNALLY LIBRARY U

TUTORIAL CENTRE (A133)

AUTOMOTIVE REPAIR

A

NORTH LOBBY

COMMON MARKET

COURTYARD

SOUTH LOBBY

O

CENTRE FOR APPLIED TECHNOLOGY

NAIT WAY

BISTRO L

Y

NEXEN THEATRE

W

hp CENTRE

TECH STORE

BYTES

PRINCESS ELIZABETH AVENUE

PEB

HUMAN RESOURCES

PE

TO KINGSWAY MALL

Automated External Defibrillator Locations

A	West corridor opposite A141
A	West corridor near A180
B	Beside B111
D	Mobile unit in Security vehicle
E	2nd floor between H and G wings
E	Gymnasium - northeast corner
F	2nd floor beside F209
J	Basement across from J001
L	Adjacent to main floor elevator
O	Health Services O119
O	Inside executive office
PE	2nd floor reception
S	Basement fitness centre
S	Arena besides office
T	2nd floor lobby
U	South Wall - U corridor
V	2nd floor, south stairwell
W	2nd floor beside Computer Commons
X	Main floor next to Chai's, north entrance
Y	East entrance
CAT	Besides elevators
HET	HET building – 11940 109 Street

Table of Contents

A.   WHAT is NASA and WHERE are We?

The NAIT Academic Staff Association (NASA) was established in 1982 as an association under Section 30 of the Technical Institutes Act.

In 2004 the Technical Institutes Act was incorporated into the Post-Secondary Learning Act, which establishes NASA as a corporation and consists of the academic staff members of the technical institute. The NAIT Academic Staff Association has the exclusive authority to negotiate a Collective Agreement on behalf of the academic staff members. The Collective Agreement between the Board of Governors and the Academic Staff Association, which outlines the terms and conditions of employment, is attached as Appendix A.

The Act also indicates that the business and affairs of the Association shall be managed by an Executive, who shall be elected by the staff members.

Office Location: E230
Email: nasa@nait.ca
Website: www.naitacademicstaff.ca
Telephone: 780.471.8702

Information about NASA can be found on NASA's website which is located at http://www.nait.ca/nasa. Information at this site includes:

- NASA/NAIT Collective Agreement
- NASA Constitutional and Policy Bylaws
- Association Budget and Financial Statements
- Executive and Committee Member Lists
- Executive Meeting Minutes
- Corporate Discounts Available to Staff
- Intercom: Faculty Conversation

B. NASA ELECTED OFFICERS, STAFF AND COMMITTEE MEMBERS

The Academic Staff Association is lead by a group of individuals elected pursuant to the Constitutional Bylaw (see Appendix C). NASA also has three hired staff to facilitate the operations of the organization.

PRESIDENT – GARRY WILSON

I have been at NAIT for 13 years, as an instructor in the Electrician and Powerline Technician Programs. Prior to coming to NAIT, I was the owner/manager of an electrical contracting company for 16. Years having a staff of 40 employees at one point, I know the trials and the responsibility, for the wellbeing of the people I work with. I am proud to be part of the NAIT community and proud to be a NASA member.

I have been involved with NASA for the past 11 years, where I have served as a School Rep for SEET and SICET, as well as serving on the Membership Services Committee. I also have the experience as Executive representative on the Bargaining Committee for two years, and various NAIT committees. I have served a four year commitment as the VP of Membership Services Committee and serve as NASA representative on NAIT's Board of Governors and Academic Council.

I have a vision for NASA, which I see as an organization to help provide a safe, enjoyable and respectful work environment. NAIT has been going through many changes over the last few years and NASA needs strong leadership to help keep our members safe and on a course, that is beneficial to both NAIT and NASA members. I will provide the experience, commitment, and lead NASA into a strong future.

COMMUNICATIONS VICE PRESIDENT – GORDON CUTTING

Gordon Cutting graduated from the University of Alberta in 1997 with a B.Sc. specializing in Mathematics and Physics. After teaching briefly at the U of A he began working at NAIT in 1998 and has been an Instructor at NAIT ever since.

For the last seven (7) years he has been teaching in the Instrumentation Eng.Tech. Program, but before that he has taught for HVAC/BEST and the Physics Department. This experience gives him a unique outlook on teaching here at NAIT and the challenges faced by the varied and diverse programs NAIT delivers, both in the Technologies and Apprenticeships.

As a NASA Executive member for the last 12 years Gordon has seen a great deal of change, both positive and negative, as NAIT strives to meet the challenges set out by government funding fluctuations,

Outcome Based Education, the 15 week program adoption and now Restructuring. He believes oversight on the part of the Staff Association is vital during these changes to ensure that staff issues and concerns are addressed and dealt with. Gordon looks forward to the continued opportunity to represent his fellow NASA members in the Association.

FINANCE VICE PRESIDENT – TERRY SULYMA

Terry Sulyma joined NAIT in 1989 as an instructor in the School of Business after having spent a semester teaching as a NAIT representative in Chengdu, Sichuan, China in 1988. He teaches Strategic Management, Operations Management and Economics. He has taught at Athabasca University and Cape Breton University. He was at NAIT 11 years before becoming a permanent instructor at NAIT. Terry has co-authored seven (7) editions of **Economics Today: The Macro View.**

Terry earned a MBA from the Schulich School of Business, York University as a Canadian Imperial Bank of Commerce Centennial International Fellow and then a MPA from York University. He was the owner manager for 15 years of the medium size manufacturer of school furniture, office furniture and aluminum windows and doors at Wesbac Industries in Edmonton and Saskatoon.

Terry has served three terms (9 years) as an Edmonton Public School Board Trustee and three years as a NASA representative on NAIT's Board of Governors. He has been a School of Business Executive Representative and served two terms as NASA VP Finance.

MEMBERSHIP SERVICES VICE PRESIDENT – GLENN TKACHUK

I will continue to provide the **expertise and continuity required** to continue the great job this committee has done throughout the years.

My duties include attending monthly committee meetings, assisting with all aspects of our social functions for our NASA members: the Welcome Back lunches, Mid-Winter Frolic, and the Year-End post AGM functions. All events were an enjoyment to help plan and execute. We also approve funding for NAIT's Children's Christmas party and ACIFA conference participants.

I also sit as NASA's representative on the ACIFA Professional Affairs Committee.

I have spent considerable time visiting businesses throughout the Edmonton area to put in place corporate discounts for the benefit of NASA staff and Alumni, as well as sourcing door prizes for our Frolic event.

In addition to required duties as a MSC member, I have initiated a bottle collection project for NASA's Share the Warmth campaign. With the help of Roy Singleton and Todd Buchart, we collect the bottles and cans from our classrooms and staff areas. The monies received are then used to purchase clothing from a local distributor. All the items are donated to our four local charities.

LABOUR RELATIONS DIRECTOR – JARRET SEREDIAK

Jarret has been dedicated to Labour Relations since 2011. He has a Bachelor of Management Degree from Concordia University and holds certificates in Labour Relations from Canadian Professional Management Services, Fundamentals of Trust Management Services (FTMS) from the International Foundation of Employee Benefit Plans and also holds a designation as a Certified Professional Human Resources (CPHR). Additionally, Jarret currently serves as a Professional Trustee on Local 1460's Health & Welfare and Pension Trust Funds.

Jarret has worked in various industries over the years, such as Oil & Gas (construction & maintenance) and transportation and logistics. Before joining NASA, Jarret held the position as Labour Relations Manager for CEDA International which he provided labour relations expertise across Canada and U.S. operations. During his career, Jarret has worked on and negotiated over 20 different collective agreements, provided advice & guidance with hundreds of grievances, developed and trained management in grievance handling, administration of collective agreements and Duty to Accommodate.

EXECUTIVE OFFICER – ADÈLE WEICHEL

Adèle joined NASA in September of 2015 and prior to that was the Executive Assistant to Keyano College Faculty Association for over 21 years. She provides administrative support to the President, Vice Presidents, Executive, and the many committees of the Association. Among her duties are maintaining the financial records of the Association, tracking task assignments, administering the Employee Professional Development Accounts and ensuring the smooth operation of the NASA Office.

Adèle has a Chartered Professional in Human Resources (CPHR) designation, the Society for Human Resources Management-Senior Certified Professional (SHRM-SCP) designation, a Registered Professional Recruiter (RPR) designation, along with Business Administration, Human Resources Management from Keyano College and Occupational Health and Safety Certificate with Distinction from the University of Alberta.
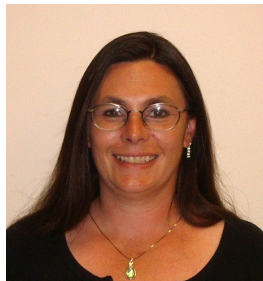
ADMINISTRATIVE ASSISTANT – LANA BJORKQUIST

Lana, another long-time employee of the Association, was hired in 1992 and works four days per week. She provides reception and administrative support to the Executive Officer, Labour Relations Director, Bargaining, Membership Services and Communications Committees. Lana has a Diploma in Hotel/Restaurant Management and a Certificate in Business Management from NAIT.

In addition to the above individuals, there are many other elected committee members and volunteers who ensure that the mission of the Association is carried out. A list of the current Elected Officers and Committee Members is attached in Appendix B.

C. CONSTITUTIONAL BYLAW

The Post-Secondary Learning Act requires that the Academic Staff Association make bylaws governing its affairs. The Constitutional Bylaw (Appendix C) describes the Association's mission:

> **"To serve its membership through contract negotiations and advocacy, while fostering academic identity through open communication, professional and personal development, and mutual respect."**

To fulfill its mission, the Association will:

- Adhere to its bylaws.
- Professionally manage its affairs.
- Enter into negotiations for the purpose of concluding a collective agreement.
- Advocate on behalf of the members.
- Manage its resources.
- Communicate with members.
- Facilitate membership services.
- Foster internal and external interactive communication.

The Constitutional Bylaw also contains articles outlining:

- Membership restrictions and fees.
- Membership meetings.
- Executive responsibilities and composition.
- Appointments, elections and terms of office.
- Financial matters.
- Dissolution and disposition of assets.
- Arbitration.

D. ASSOCIATION STRUCTURE
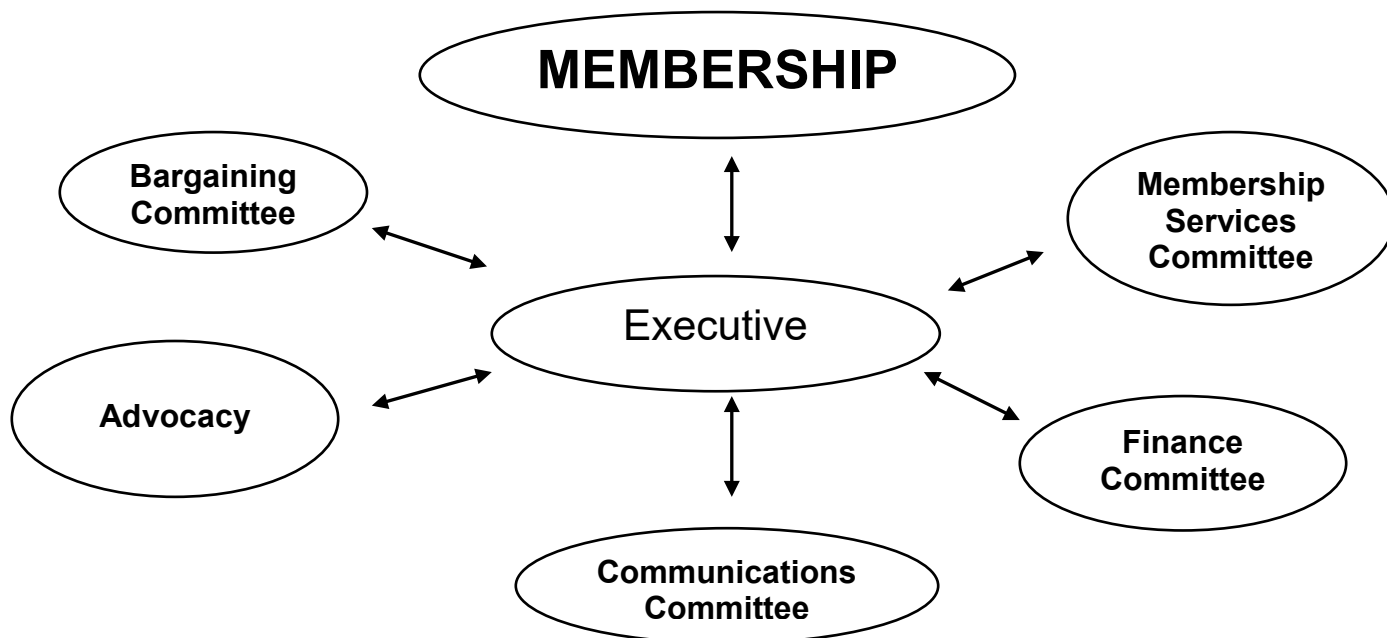
1.   Executive

The Executive manages the business and affairs of the Association. Legislation relating to the Association is periodically reviewed by the Executive and recommendations to the Constitutional Bylaw are made. The Executive may establish ad-hoc committees and appoint representatives to joint committees of the Association, Administration, and Board of Governors as deemed necessary for the effective operation of the Association. It also provides direction and assistance to NASA committees, communicates issues and activities to the membership, and forecasts and develops short- and long-term plans for the Association.

The voting officers of the Executive are the following:

- President
- Communications Vice President
- Membership Services Vice President
- Finance Vice President
- Twelve School Representatives

The non-voting members of the Executive are the following:

- Two Board Representatives
- Past President
- Labour Relations Director
- Executive Officer

Executive meetings are held every third week (Wednesday) starting in September. Members are welcome to attend all open portions of these meetings. Members may add items to the Executive agenda by calling Adele at 780-471-8504 by noon on the Friday before the meeting.

The Role of Advocacy

The Executive representatives also work on behalf of the membership in an advocacy role. During their meetings they discuss academic staff concerns, solutions and grievances. They also discuss recent settlements, new policies, and/or legislation. In addition, Executive members meet and acquaint new members with NASA; liaise with members and report their issues and concerns to the Labour Relations Director, President, and the Executive; inform members of their rights and responsibilities; and if requested, advocate on behalf of an individual member.

Grievance Process

The Association accepts its responsibility to provide fair representation to members. Section 48 of the Collective Agreement (Appendix A) outlines the Grievance Procedure. An effort should be made to resolve grievances at an early stage through effective consultation while ensuring that time limits outlined in the Collective Agreement are met.

The Association may provide representation at all steps of the Grievance Process as outlined in the Collective Agreement. The Labour Relations Director handles all formal grievances.

Association grievances shall be approved by the Executive prior to filing. The advancement of a member grievance to arbitration also requires the approval of the Executive.

2.   Bargaining Committee

The Bargaining Committee consists of up to six (6) elected members, one appointed representative from the Executive, the Labour Relations Director, and the President.

The Bargaining Committee reviews and recommends to the Executive policies and procedures pertaining to the collective bargaining process. It also acquires and analyses information, identifies issues and solicits input from the membership, and develops bargaining proposals. The Committee also nominates, for approval by Executive, members for the Bargaining Team.

Bargaining Team

The Bargaining Team consists of the three members appointed from the Bargaining Committee, the Labour Relations Director, and any outside agents as approved by the Executive.

The Team, in conjunction with the Bargaining Committee, discuss the opening proposals with the Executive, presents at the bargaining table the proposals of the Association, and attempts to negotiate a Memorandum of Agreement with the Board of Governors. Regular progress reports are provided to the Executive and the membership. In conjunction with the Bargaining Committee, the Team presents for Executive approval, any tentative Memorandums of Agreement. After the Executive approves the tentative Memorandum of Agreement, the Team signs it, and in conjunction with the Bargaining Committee and Executive, presents it to the membership for ratification.

The Memorandum of Agreement must be ratified by the members and the Board before it comes into effect.

Ratification of a Collective Agreement

The process for ratifying a Collective Agreement is as follows:

a)   The Bargaining Team shall ask the Executive to call a Special Meeting (as per Article 4.02 of the Constitutional Bylaw) to present the Memorandum of Agreement for ratification.

b)   The ratification vote will take place one working day after the presentation of the Memorandum of Agreement or as soon as possible thereafter.

c)   If the Memorandum of Agreement is rejected by the membership, the Bargaining Team (in consultation with the Bargaining Committee and the Executive) will determine an appropriate course of action.

d)   If a new Memorandum of Agreement is negotiated, the process described above will be repeated.

e)   Prior to arbitration, any changes to the Collective Agreement agreed to by the parties shall be presented to the membership for ratification.

3.   Finance Committee

The Finance Committee consists of up to three (3) elected members and the Finance Vice President.

The Finance Committee assists the Finance Vice President in the performance of the duties of that office. It reviews and recommends to the Executive finance-related policies and procedures of the Association. The Committee monitors accounts, evaluates and selects financial services, and manages Association resources. The annual budget of the Association is prepared for approval by the Executive and audited financial statements posted for the information of the membership.

4.   Communications Committee

The Communications Committee consists of up to six (6) elected members and the Communications Vice President.

The Committee reviews and recommends to the Executive policies and procedures pertaining to NASA's corporate image, communications, and legislation. It fosters and maintains interactive communication networks, one of which is the *Intercom: Faculty Conversation* (Appendix D*)*. The Committee also provides assistance to other committees in developing, gathering, and disseminating information.

5.   Membership Services Committee

The Membership Services Committee consists of up to eight (8) elected members and the Membership Services Vice President.

The Committee reviews and recommends to the Executive policies and procedures intended to enhance membership services. It identifies professional development needs of the Association and facilitates social interaction by planning and coordinating events for the membership. It negotiates special rates and discounts for members and promotes professionalism among members of the Association.

MEMBER SERVICES

The Academic Staff Association maintains a "Corporate Sponsor Discount List" which provides staff members with a variety of vendor discounts. Check out the [NASA website](#).

During the past year, the Association has organized several social events for the membership. These have included a Welcome Back Lunch, Winter Frolic, and a Year-End gathering. Upcoming events are announced via the NAIT email and in the NASA newsletter.

PROFESSIONAL DEVELOPMENT

There are a number of avenues for members to attain professional development. Section 24 of the Collective Agreement outlines the provision for ***Institute funded*** staff development.

A brief synopsis of funding support is outlined below. Contact your Supervisor or the NASA Office for more information.

Funding Support for Professional Development (NASA related)

1.   Long-term Development Leave (> 21 working days)(Section 24 in CA)

   - Educational leaves, experience leaves, secondments and exchanges
   - Subject to approval by the Institute.
   - Return commitment required.

2.   Learning Assignment (< 21 working days) (Section 24)

   - An $800.00 Employee Professional Development Account (EPDA) will be established each year for each staff member to be used for Learning Assignments or Educational Material. (Refer to Appendix E for process and link to forms)

3. NAIT Courses

- Tuition waived on "space available" basis, with out-of-pocket expenses of $25+ and textbooks which are negotiable with program (general interest or cost recovery courses are negotiable) (Section 36)
- Support of supervisor
- Basic costs at employee expense
- Becoming a Master Instructor course (BMI) is available at no cost

4. NASA Funding

- Supplemental PD funding for the annual ACIFA conference
- Scholarships ($20,000) for family member awards

NASA Educational Award Program

NASA established the NASA Educational Award Program to encourage and assist family members of NASA staff their life-long learning.

Monies toward the NASA Educational Award Program come from interest revenue earned on NASA investments. In 2019-2020 a total of $20,000 will be made available.

• $20,000 allocated to NASA Member Family Awards.

NASA Member Family Awards

- Who is Eligible?

  * Relatives of current NASA members who have completed two years of service at NAIT, shall be eligible to apply for awards. For the purpose of this bylaw "relative" shall mean spouse (including common-law partner and same-sex partner), parent, child or grandchild.
  * Relatives, as defined in 3.3 a, of NASA Members who have completed two years of service at NAIT but have retired or become deceased within the preceding five (5) years shall be eligible to apply for awards.
  * Applicants must be registered in a full-time post-secondary educational program.
  * Applicants may only receive this award once in a lifetime.

More information and application forms are available on the NASA website or at the NASA Office.

6.   NAIT Committees – NASA Representation

Board of Governors

The Post-Secondary Learning Act (Articles 40 through 45) establishes the Board of Governors. Two NASA representatives are elected by the membership and appointed by the Minister of Learning.

The NASA Board members attend Board meetings and provide reports to the NASA Executive and the membership. They also communicate issues of the Association to the Board.

Academic Council

The Post-Secondary Learning Act (Articles 46 and 47) outlines the composition, powers and duties of the Academic Council. Academic Council makes recommendation(s) or reports on any matter referred to them by the Board, including policies related to selection and admission of students, courses and programs of instruction, and academic awards.

NASA has six elected members plus the elected President on Academic Council.

Joint Worksite Health & Safety Committee

The Joint Worksite Health and Safety Committee (JWHSC) plays an important advisory role in our occupational health and safety program. Members are appointed annually, participate in discussions and are consulted on decisions affecting health and safety.

NASA has three elected members on the JWH&SC.

E. AFFILIATES

1. ACIFA (Alberta Colleges & Institutes Faculties Association)

#317, 11010 – 142 Street   Telephone: 780-423-4440
Edmonton, Alberta T5N 2R1   Website: http://www.acifaweb.ca

ACIFA (Alberta Colleges & Institutes Faculties Association) is a representative professional association that acts as the provincial voice for its members – the academic staff associations of Alberta's colleges and technical institutes. Through the collective action and resources of its members, ACIFA promotes the professional and economic well being of college and technical institute faculty in the interest of advancing the quality of post-secondary education in Alberta.

ACIFA represents its members' interests to government. ACIFA communicates regularly with the Minister and Department of Learning and is recognized as the representative voice for all public college and technical institute faculty.

ACIFA seeks to improve the welfare of its members through lobbying efforts, participating in provincial education coalitions, and providing information and assistance in the collective bargaining process to member associations.

ACIFA sponsors workshops for negotiations of collective agreements and the professional development officers of member associations. Each year, ACIFA and member associations sponsor a spring conference in conjunction with ACIFA's annual general meeting.

Organization

Several bodies are elected from the ACIFA membership. An elected executive committee of five officers (the President, Vice President Negotiations, Vice President Professional Affairs, Secretary, and Treasurer) runs ACIFA's day-to-day affairs. A Presidents' Council – composed of the president of each association plus the executive committee – is the governing body of the association between annual general meetings and gives direction to the activities of ACIFA's various committees. Working committees include the Negotiations Advisory Committee and the Professional Affairs Committee.

History

ACIFA was formed as a federation of faculty associations including the technical institutes in 1984. ACIFA has a history of service dating back to 1967, first as the Alberta Association of Junior College Faculties and then as the Alberta Association of College Faculties.

Membership

Every member of constituent faculty associations is a full member of ACIFA, entitled to stand for office, serve on committees, and attend general meetings. Institutional and individual associate memberships are also available.

Dues

Association dues are set by special resolution at the annual general meeting and are remitted through the individual faculty associations.

2.   CAUT (Canadian Association of University Teachers)

ACIFA holds associate member status with CAUT. Founded in 1951, CAUT is the national voice for academic staff. Today, representing 65,000 teachers, librarians, researchers and other academic professionals and general staff, CAUT is an outspoken defender of academic freedom and works actively in the public interest to improve the quality and accessibility of post-secondary education in Canada. CAUT has always counted notable figures among its members. Former CAUT presidents and activists include past Supreme Court Chief Justice Bora Laskin, MPs Pauline Jewett and Howard McCurdy, and Manitoba Premier Howard Pawley.

CAUT Working for you

From lobbying governments to providing collective bargaining and legal support, CAUT actively advances the social and economic interests of its members. CAUT offers courses, workshops and conferences, and investigates threats to academic freedom. The national office undertakes extensive research, and publishes reports, newsletters, books and a monthly newspaper. CAUT liaises with Canada's media and works in national and international coalitions dedicated to the welfare of academic staff and students.

Where we stand

CAUT actively promotes public post-secondary education that meets the needs of students and the public. We press for public funding and policies to ensure our institutions are accessible and to safeguard the freedom of our members to teach and conduct research unrestricted by commercial or other special interests.

Making a difference

CAUT advances equity and human rights within our profession. We fight for fair working conditions, compensation and benefits that foster quality teaching and innovative research. CAUT works for collegial institutional governance that is publicly accountable and gives the academic community its proper voice.

APPENDIX A

COLLECTIVE AGREEMENT

APPENDIX B

NASA ELECTED OFFICERS AND COMMITTEE MEMBERS

APPENDIX C

CONSTITUTIONAL BYLAW

CONSTITUTIONAL BYLAW

OF THE

NORTHERN ALBERTA INSTITUTE OF TECHNOLOGY

ACADEMIC STAFF ASSOCIATION

With Amendments to

May 2019

APPENDIX D

INTERCOM: Faculty Conversation

For Current and Archived
issues of INTERCOM,
please visit the [NASA website](#).

APPENDIX E

FORMS

Employee Professional Development Account (EPDA)

NAIT will contribute $800.00 per year (prorated for part-time staff) to a maximum of $2400 into an individual Employee Professional Development Account (EPDA) for each staff member. (Section 24 of the NAIT/NASA Collective Agreement)

However, newly hired NASA members are not eligible for EPDA funding until they have completed one (1) year of employment.

Although EPDA is administered by the NASA office, it is NAIT funded; therefore **expenses must be in accordance with NAIT guidelines.**

Funding can be used to participate in courses, programs, conferences, seminars and workshops, Educational Material (the purchase of subscriptions to professional journals, educational software, reference material or textbooks) or the payment of Membership Dues/Fees in a Professional Association that is not covered under Section 35. Hardware, such as computers are **NOT** permitted.

There are a variety of avenues for academic members to receive professional development funding.

1) **Program/School/Institute Funding**

    If the program is providing funding to cover the entire cost complete the NAIT Travel Authorization and include a breakdown of all expenses. Submit the form for approval according to NAIT Guidelines. As per the Collective Agreement any professional activity that is <u>required</u> by the program shall be funded exclusively by the program. **Note: Expenses must be in accordance with NAIT guidelines.** Travel forms can be found on the NAIT website under eforms.

2) **Employee Professional Development Account** (Section 24.02(b) of the Collective Agreement)

Confirm your EPDA funding amount by emailing adelew@nait.ca or calling 780-471-8504 and/or Lana Bjorkquist 780-471-8702 or emailing the NASA office at nasa@nait.ca.

If you have EPDA funding available to cover the entire cost complete the EPDA Application form.

Submit to your Supervisor to sign off for relevancy and time off from work to attend. Once this form is signed you can register, pay and attend the activity. Hold onto the EPDA Application form until you are ready to submit your claim through NAIT's Online Travel and Expense system.

NAIT

Learning Assignment, Education Material and Professional Membership Fee

Reset Form

Section A - Application *(completed by Staff Member)*

Employee Name _____   Employee ID _____

Program/Dept _____   Current Position _____

What is the benefit/relevancy of this Learning Assignment, Educational Material or Professional Membership Fee? *(max of 200 characters)*

☐ **Workshop/Conference/Seminar**

Title _____   Dates _____ to _____
                                   MM/DD/YYYY   MM/DD/YYYY

Location _____   Number of days Absent _____

			Costs			
Registration	Accommodation	Materials	Other	Food	Travel	**Total**
						$0.00

☐ **Educational Course i.e. Degree, Certificate**

Course Title _____   Dates _____ to _____
                                          MM/DD/YYYY   MM/DD/YYYY
Institution _____

Costs		
Registration	Materials	**Total**
		$0.00

Time off if applicable _____ to _____
                        MM/DD/YYYY   MM/DD/YYYY

☐ **Educational Material** (Subscriptions to Professional Journals, Educational Software, Reference Material, Textbooks)

☐ **Professional Membership Fee** (Fees paid to a professional association not covered under Section 35 of the Agreement)
Description of Item *(max of 100 characters)*

Total Cost _____

Is this Application in conjunction with Program Funding? ☐ Yes ☐ No If Yes, amount _____

_____   _____
Applicant Signature   Date

Submit Application to the Work Unit Supervisor for authorization

- -

Section B - Authorization

To be completed by Work Unit/Supervisor

Signature indicates that activity is relevant to the Program/NAIT initiatives and operation needs will be met allowing the staff member to engage in PD activity. Support does not imply full funding. ☐ Approved ☐ Denied

_____   _____
Work Unit/Supervisr Signature   Date

Application to be returned to Staff Member. If denied, attach rationale for denial and send a copy to NASA

- -

Section C - Expense Claim

Scan and attach to the on-line Travel and Expenses process. NASA Office (E230)

NASA Office (E230)   EDU-PMF-F01 02/05/2018

3)   Combined Sources of Funding

If you are using Program and EPDA funding, the process is a little complicated as it requires that both the EPDA application **and** NAIT's Travel Authorization forms be completed for each area. Outlined below is a sample of the steps required when seeking and claiming funding from both sources.

Filling out the Application Forms
a)   Complete the online NAIT Travel Authorization form showing all proposed expenses. Indicate by asterisks (*) if and where other funding is being applied for.
b)   Complete the EPDA Application form (Learning Assignment, Educational Material & Professional Membership Fee). Indicate at the bottom of Section A the amount of other funding being applied for.
c)   Ensure you **sign the EPDA Application form** as it authorizes the NASA Office to release your EPDA funds.
d)   Submit both the NAIT Travel Authorization and the EPDA Application form to your Supervisor's approval. Once approved, hold onto both forms until after the activity.
e)   After receiving approval from both funding areas you may register, pay and attend the activity.

Applying for EPDA Funds and Completing the NAIT's Online Travel and Expense Claim

Please use the following steps when completing and submitting on to NAIT's Online Travel and Expense Claim. All forms along with the EPDA Application form are located on the NASA website.

1. Confirm your EPDA account balance by calling either Adèle Weichel at EXT. 8504 and/or Lana Bjorkquist EXT. 8702.

2. To access the EPDA application forms, please review the NASA website to enable you to print off, complete, and sign the Application form. Ensure you **sign the EPDA Application form** and have your supervisor sign it. Purchase the item(s) or attend the event - keep your receipts as you will need to attach your completed EPDA application form and relevant documents to NAIT's Online Travel and Expense claim process.

3. Please note when booking flights, you are encouraged to make reservations through Uniglobe Travel; however, you **cannot charge** your airfare expense to NAIT's account and/or the EPDA account as you are required to **you pay for your own flights**.   Failure to comply with this request may result in the department program and/or you picking up the expenditure due to not having sufficient EPDA funding to cover your expenses.

4. To access NAIT's Online Travel and Expense Claim process you must go to your employee profile on the staff portal located on the NAIT staff network.

5. To complete the online process, below are various screen shot of an expense claim when using EPDA funding. In order to ensure the expense is charged to EPDA, please insert the EPDA department ID **120306** or your individual department ID code if funding is not covered fully by EPDA funds and is being partially covered by your own department.

6. Once again, prior to completing the claim, you will need to determine what funding amount is covered by EPDA and your department (if any) to eliminate it from being sent back for revision. Once you have determined the funding that is covered by EPDA and your department, then you will enter all the expenses and identify what portion is covered by EPDA (**120306**).

7. You will be required to scan and attach your EPDA application form, along with all your relevant documents pertaining to your claim. **"Attachments"** icon is located under the **"Default Location"** section.

8. If the claim is to be split between EPDA and your department, you will have to determine what amount is covered under each department ID.

   Once you have determined the amounts, you can then enter your expenses. However, in order to correctly allocate the amount to EPDA and department, you will need to select the line item under **accounting detail** which will you give access to reallocate the amount between EPDA (**120306**) and department expense codes. You must do this for each line item to ensure what appropriate funding amounts are allocated to EPDA (**120306**) and to the department.

Per Diems and Incidental Allowance

Meals and Incidental Expenses within Canada

The meal allowances (per day) without receipts are:

Breakfast: $15.00
Lunch: $15.00
Dinner: $30.00
Incidental: $10.00

Meals and Incidental Expenses outside of Canada

The meal and incidental allowance for travel to the United States or other destinations are the same as in Canada except the amounts are converted into the currency of that country.

This will be converted into Canadian funds at the conversion rates in effect at the time of travel. This can be computed from the actual rate paid for purchase of US dollars substantiated by a receipt, or rates as quoted on your credit card statements, or from a website such as http://www.bankofcanada.ca/en/rates/exchange.html

Cash Advance Requests

Cash Advance Requests are to be used only when travel expenses involve payment of flights. Conference registrations fees will only be reimbursed if the event corresponds with flights.

Please ensure that you attach your EPDA application form and payment receipts to the Cash Advance Request. As per NAIT guidelines if you receive a cash advance then your claim should be submitted within 20 days following your return to work.

Payment Process

Once you submit your claim to Adèle Weichel, it will be reviewed, and if no revisions are required, it will be forwarded to the HR designate and then forward to Accounts Payable.

Accounts Payable will ensure the appropriate amount are charged to the correct budget accounts. Reimbursement will be by direct deposit.

<u>**EPDA Deadline Dates:**</u>

To further eliminate payment delays, and stay within NAIT's fiscal year (July 1st to June 30th), please be advised that all NAIT online travel and expense claims must be submitted using the following schedule:

Expenditure Dates:	Deadline Dates:
July 1st to September 30th	November 15th
October 1st to December 31st	January 15th
January 1st to March 31st	April 15th
April 1st to May 15th	June 1st
May 16th to June 15th	June 25th

Failure to comply with the above specified schedule may result in non-payment of expenses.

Steps for Creating an Expense Report

To Log into the Finance System go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.
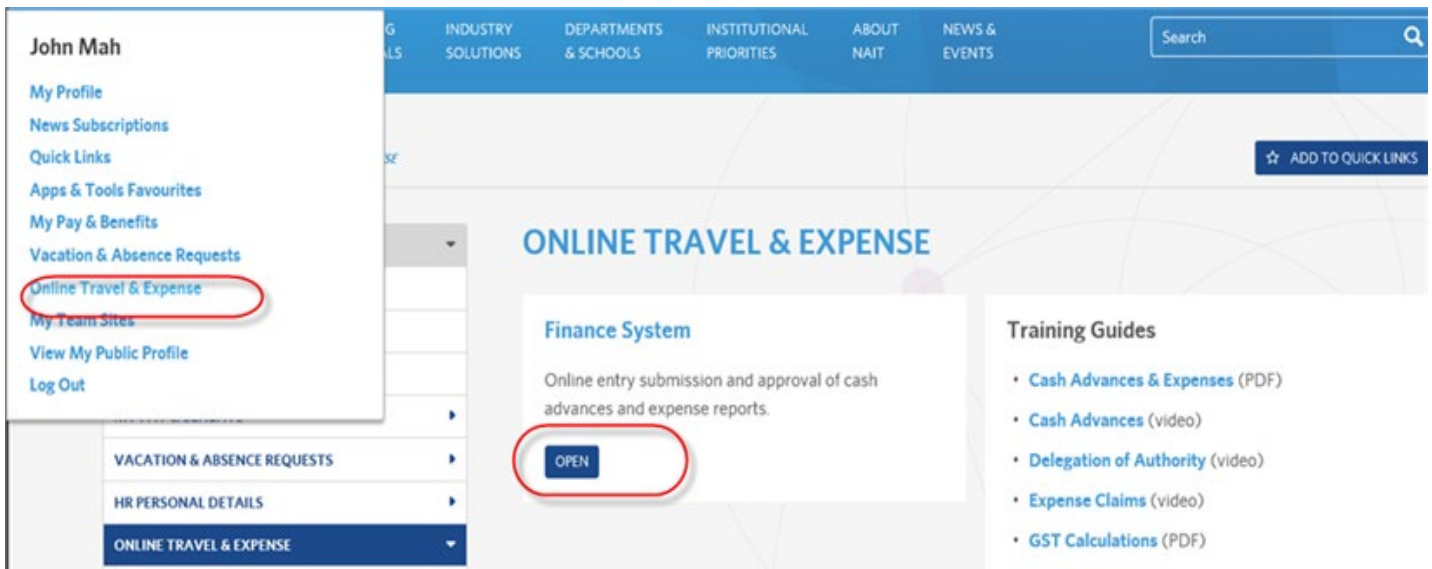
Once in the Finance System follow the link:

MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY
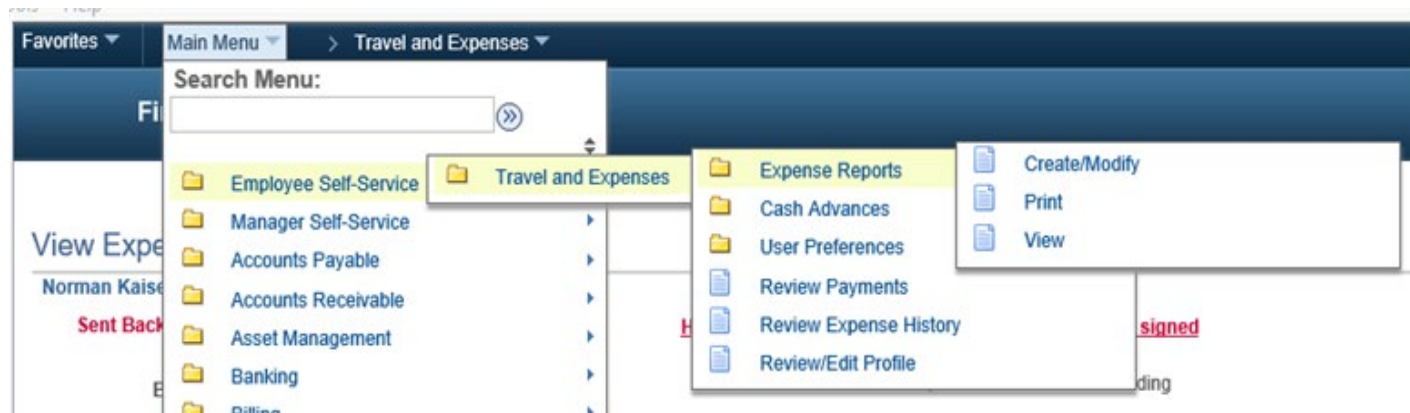
The first screen you will see illustrated below is to create a new expense claim in which it automatically selects the tab "**ADD A NEW VALU**" icon. Your Empl ID number will instantly populate. Click on the "**Add**" icon which will create a new expense claim.
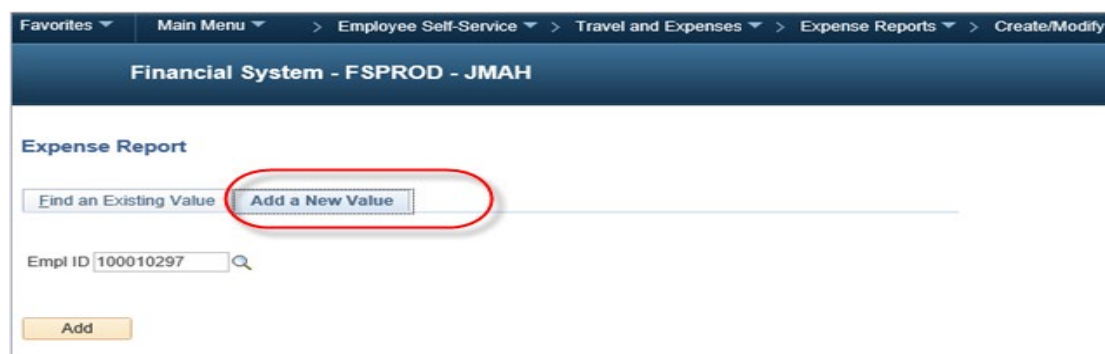
Fill in the required General Information fields illustrated below.

Field Name	Field description:
Business Purpose:	NASA-Emp Prof Dev Acct
Report Description:	High Level Description of Expense details
Reference:	Do Not Use
Default Location:	NAIT
Attachments:	Under the Default Location: Click the "**Attachments**" icon to include EPDA application form, payment receipts, travel authorization if required, and per diem details.

To change the accounting defaults for the entire claim at a header level, one expense line must be entered. (Illustrated on the next page.)

When one expense line has been entered, the Quick Start menu seen above changes to an Actions menu in the top right corner. You must enter the EPDA department ID code **120306** and there is no project code.

Enter expense information in the details section. **The Amount should include all taxes and be the total amount of the expense**. For those expense types that GST cannot be calculated by the system, the employee must enter it from the receipt. This amount should only reflect GST and not include HST or PST amounts. If there is not GST please click **"No GST"**.

To save but not submit for approval, click on the **"Save for Later"** icon located on the top right-hand corner.

To submit for approval, click on **"Submit Expense Report"** icon located on the top right-hand corner.
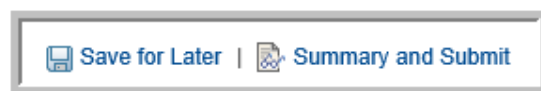
It will bring you to another page whereby you must **Check the Box** illustrated below and then click on **"Submit Expense Report"** icon.

☑ By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

Once your expense claim has been **"Saved for Later or Submitted"** a Report ID will be assigned to you and the approval workflow appears. Example:

▼ Approval History

| Submitted Yvonne Blake | Department Review John Mah | Accounting Reviewer (Pooled) | HR Supervisor Approval Arden Kobewka | Department Approval Arden Kobewka | Pre Pay Auditor Octavio Flores Rodriguez | Payment |

Action	Role		Name	Date/Time
Submitted	Employee		Yvonne Blake	03/25/2019 11:10:13AM

Return to Search   Notify

Modify an Existing Report

Log into the Finance System go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.

John Mah

My Profile
News Subscriptions
Quick Links
Apps & Tools Favourites
My Pay & Benefits
Vacation & Absence Requests
Online Travel & Expense
My Team Sites
View My Public Profile
Log Out

INDUSTRY SOLUTIONS   DEPARTMENTS & SCHOOLS   INSTITUTIONAL PRIORITIES   ABOUT NAIT   NEWS & EVENTS

Search

☆ ADD TO QUICK LINKS

ONLINE TRAVEL & EXPENSE

VACATION & ABSENCE REQUESTS
HR PERSONAL DETAILS
ONLINE TRAVEL & EXPENSE

Finance System

Online entry submission and approval of cash advances and expense reports.

OPEN

Training Guides
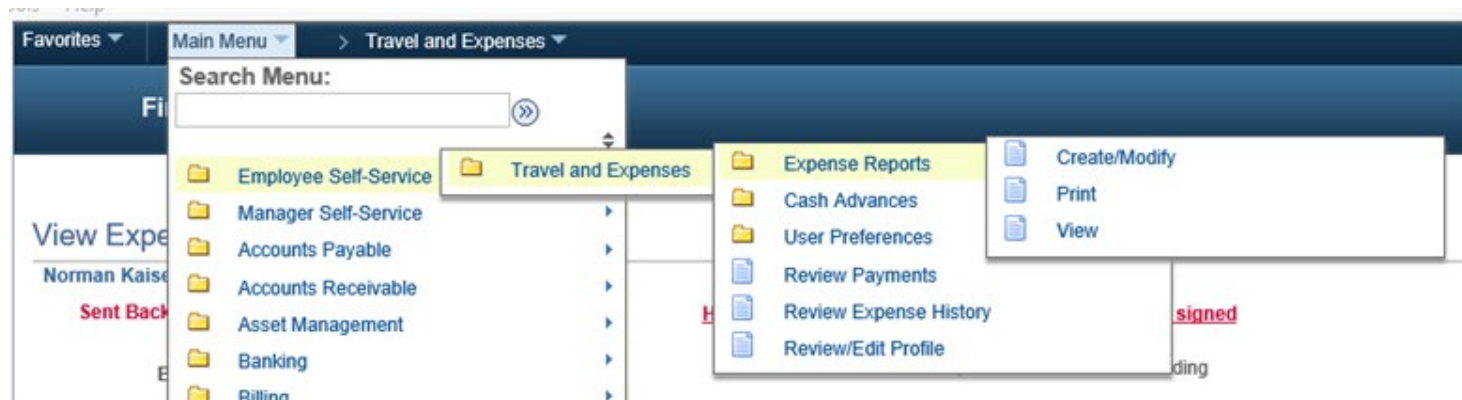
• **Cash Advances & Expenses** (PDF)
• **Cash Advances** (video)
• **Delegation of Authority** (video)
• **Expense Claims** (video)
• **GST Calculations** (PDF)

Once in the Finance System follow the link:

MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY

If an expense claim has been sent back to you for revision/correction you will need to click on **"Find an Existing Value"** icon in which you can either enter the **"Report ID"** or select **"Search"** icon to find any pending claim that have been sent back to you or claims that you have saved for later that are currently pending in your queue.

Select the claim to be modify and **read the comments** of those sent back as to what needs to be corrected and complete the revision and then resubmit the claim again.

Click on **"Find an Existing Value"** icon

Enter your Report ID and click **"Search"** icon– this will bring up any expense reports available to be modified

Do any modifications and then click on "Summary and Submit" – top right hand corner

It will bring you to another page whereby you must **"Check the Box"** illustrated below and then click on **"Submit Expense Report"** icon.

Completing Online Travel and Expense Claims using Remote VPN Access

While on leave such as vacation, NASA members have the ability to submit an expense claims using the Remote VPN access link. (See below)

https://remote.nait.ca/global-protect/login.esp

How-To Guides

The "how-to" guides for employees and reviewers/supervisors/budget owners are located on the NASA website and your NAIT Staff Portal under Online Travel and Expense.

Travel and Expenses: Employee Entry

Please visit: https://www.naitacademicstaff.ca

               Click on Professional Development

               Click on Employee Professional Development Account

               Click on Travel & Expenses: Employee Entry