

March 20, 2017

To: Region 5 L.E.C.s, Stewards, E.B.M.s, and Staff
From: Region 5 Education Committee

Please make this information available to all Local members.

LOCATION: **Courtyard by Marriott Downtown Toronto**
475 Yonge Street, Toronto, ON M4Y 1X7
Tel: Toll-free 1-800-847-5075 or 416-924-0611

NOTE: SOME CLASSES MAY BE OFFERED AT THE OPSEU TORONTO REGIONAL OFFICE, MEMBERSHIP CENTRE @ 31 WELLESLEY STREET EAST

Agenda

Sat., June 3, 2017 9:00 am – 5:00 pm (approx.)

Sun., June 4, 2017 9:00 am – 1:00 pm (approx.)

Note: Classes may end early if the course material for the day has been completed.

Note:

Childcare will be available:

Sat. from 8:30 am – 5:00 pm
and 6:00 pm – 11:00 pm.

Sun. 9:00 am to end of classes

➤ Please complete and return the necessary forms to the **Wellesley Office, Toronto Regional Office**

1. Application/Advance Form signed by 2 Officers of your L.E.C.
2. Registration Form for Child Care
3. Union Activity Form which **MUST** be completed.

If you are submitting a Human Rights Accommodation Request Form, this can be sent directly to the Equity Unit or submitted with your other forms to the regional office. (Equity fax # 416-448-7419)

- The Course Selection Process will be carried out in accordance with OPSEU Education Policy. The Education Committee will not entertain class switches and due to overwhelming demand there are no wait lists for classes.
- Applications will be rejected if the signatures of 2 Local Executive Officers have not been obtained on the Application Form.
- Officers of your L.E.C. mean President, Vice-President(s), Secretary, Treasurer, or Chief Steward. If you are a Local Officer, the signature of another Officer must be obtained.
- Confirmation will be sent to applicants who are accepted.
- Late applications will **not** be acknowledged.
- Please bring a copy of your most recent collective agreement with you to the Educational.
- You **MUST** bring your acceptance letter to the Educational

- As a reminder in accordance with OPSEU policy, Full Attendance is mandatory for participants at the educational. If you are unable to attend with Full Attendance without an acceptable reason, you may not receive credit for the course and your expenses may not be paid.

Deadline: 4:00 p.m. April 7, 2017

31 Wellesley Street East, Toronto, ON M4Y 1G7
Fax# 416-944-0288// Telephone #416-443-8888 or 1-800-268-7376 (toll free)



Name _____

Local # _____

UNION ACTIVITY

1. WHAT POSITIONS HAVE YOU HELD IN YOUR LOCAL OR WITHIN OPSEU?

2. WHAT ARE YOUR REASONS FOR APPLYING FOR THIS EDUCATIONAL?

3. HOW WILL YOUR LOCAL BENEFIT FROM YOUR ATTENDANCE?

4. WHAT IS YOUR RECENT ACTIVITY WITH YOUR LOCAL AND OPSEU?

Statement of Respect To be Read out at All OPSEU Events

Harassment or discrimination of any kind will not be tolerated at OPSEU functions.

Whenever OPSEU members gather, we welcome all peoples of the world. We will not accept any unwelcoming words, actions or behaviours against our union members.

We accord respect to all persons, regardless of age, political affiliation, including people of colour, women, men, First Nations, Métis and Inuit peoples, members of ethno-racial groups, people with disabilities, gays, lesbians, bisexual, transgender/transsexual people, and gender diverse persons, francophones and all persons whose first language is not English.

In our diversity we will build solidarity as union members.

If you believe that you are being harassed or discriminated against, contact Your Course Facilitators for immediate assistance.

* It is the event coordinator's responsibility to designate at least two qualified persons. The names and phone numbers of such persons must be listed. One of the designated members shall be female



We also remind you of our policies that designate all OPSEU events as

Scent free – Nut free – Smoke free

We ask all participants to turn off cell phones, smoke outside and refrain from the use of perfumes and colognes or nuts.



COURTYARD MARRIOTT
475 Yonge Street
Toronto, ON M4Y 1X7
Tel: 1-800-847-5075/416-924-0611

ATTENDANCE FORM
REGION 5 June 3-4, 2017 EDUCATIONAL
at the COURTYARD MARRIOTT HOTEL

PERSONAL INFORMATION:	LOCAL: _____ UNION #: _____	
	EMPLOYER/MINISTRY: _____	
	NAME: _____ Last First	
	Home Address: _____ Street City Postal Code	
	Phone Numbers: _____ Home Business	
	E-Mail: H: _____ W: _____	
COURSE SELECTION: Please mark 1 st , 2 nd and 3 rd choices	Stewards 1: Making a Difference in the Workplace (English)	Basic Grievance Handling
	Délegué Syndical 1: Faire une Différence dans le Milieu de Travail	Health and Safety Level One
	Stewards 2: Facing the Employer, Building Member Involvement Prerequisite: Stewards 1	Duty to Accommodate 1
	Stewards 3: Dealing with Discipline	Cross Cultural Communication
CHILDCARE:	Please complete the Childcare Registration Form (Attached on page 8) CHILDCARE WILL ONLY BE PROVIDED FOR THE <u>NUMBER OF CHILD(REN)</u> LISTED ON THE FORM	
PLEASE NOTE:	If you require a human rights accommodation, please complete the Accommodation Request Form (Attached)	
ACCOMMODATION	<p>Courtyard by Marriott Downtown Toronto: 475 Yonge Street, Toronto, ON M4Y X7 Tel: Toll Free 1-800-847-5075</p> <p>Book your own room before May 2, 2017 *see note below</p> <p>You are responsible for contacting the Courtyard by Marriott Downtown Toronto to book your accommodation. As per OPSEU Policy, members will be reimbursed for the cost of twin-shared occupancy only. Members who bring children to Union events will be entitled to single accommodation and meal expenses. Members will be responsible for payment of hotel room upon check-out. Accommodation expenses will be paid in accordance with OPSEU Policy. (Please see attached information sheet).</p> <p><u>Single/Double: \$189.00 Triple: \$209.00 Quad: \$229.00</u> (Taxes not included)</p>	

Note: June Educational only

NOTE: To avoid any disappointment, please book your guest room immediately after forwarding your fully signed application to OPSEU. Do not wait for your confirmation letter to book your guest room. Your confirmation letter will be sent later.



Advance Form

Please return to:
advances@opseu.org Fax: (416) 448-7450

Name: _____

Local #: _____ Union #: _____

Home address: _____

Phone: _____

Event information (completed by staff assigned)

Meeting: Region 5 June Weekend Educational

Meeting date: June 3-4, 2017

Location: 475 Yonge Street, Toronto - Courtyard Marriott Toronto

Cost centre: RE06-95-90

Event ID: _____

Staff assigned: Juliet ext: 2585

Date: (mm/dd/yyyy) _____

Advance request for hotel

Amount	Date (mm/dd/yyyy)
\$	
\$	
\$	
\$	

Estimated advance amount

If you require a human rights accommodation please download and complete the Human Rights Accommodation Request Form from the OPSEU website or contact the Equity Unit at extension 8790.

Advance request for parking

Amount	Date (mm/dd/yyyy)
\$	
\$	
\$	
\$	

Hotel name: _____

Advance request for travel (airfare/train/taxi)

Amount	Date (mm/dd/yyyy)	Type
\$		
\$		
\$		
\$		

Advance request Childcare/Attendant care (Childcare/Attendance Care)

Amount	Date (mm/dd/yyyy)
\$	
\$	
\$	
\$	

For hotel reimbursement please refer to OPSEU hotel rates and expense guidelines outlined in the call package.

Total estimated advance
amount requested \$ _____

Delivery method

☐ Personal deposit ☐ Pick-up at Regional Office ☐ Mailed to home address above ☐ Deliver to staff (Name: _____ ext. _____)

* Reminder: All outstanding advance amounts will need to be reconciled prior to a new advance being issued.



LOST WAGES (read changes on information sheet)

Lost wages will be considered according to the Education Policy

LOST WAGES WILL ONLY BE PAID IF REQUESTED ON THIS FORM

Will you be applying for lost wages: ☐ Yes

☐ No

If YES, indicate dates for time off: Fri. June 2 _____ Sat. June 3 _____ Sun. June 4 _____

Number of hours: _____ Hourly rate: _____ Total wages being claimed: _____

(LOCAL AUTHORIZATION (OFFICERS OF THE L.E.C.))

NOTE: APPLICATIONS WILL NOT BE PROCESSED WITHOUT THE REQUIRED LOCAL LEC AUTHORIZATION!!!

Local Executive Officer Signature

Position

Local Executive Officer Signature

Position

Please complete the following:

OPSEU is committed to achieving the equitable participation of designated group members in its education programs. As such, the indication of your designated group status will enable us to assess our progress in reaching this goal.

Aboriginal Worker		Worker with a disability	
Woman Worker		Racialized Worker	
Young Worker		Francophone Worker	
LGBTQIAQQ2S (Lesbian, Gay, Bi-sexual, Transgender, Transsexual, Intersex, Asexual, Queer, Questioning and Two-spirited)			

Please identify a list of the courses you have previously taken with OPSEU:

_____	_____
_____	_____
_____	_____

IMPORTANT: Please complete & return this 2 page form by **Friday, April 7, 2017**

to: OPSEU Wellesley Office, Toronto Regional Office

ATTENTION: Juliet Feddoes, Fax: (416) 944-0288 or Email: jfeddoes@opseu.org



INFORMATION SHEET

APPLICATIONS

Application forms must be signed by two (2) Local Executive Officers and received by the **Wellesley Office, Toronto Regional Office** no later than 4:00 p.m. – **April 7, 2017**

ACCOMMODATION

A block of rooms has been reserved at the Courtyard by Marriott Downtown Toronto:

- Tel: 1-800-847-5075, and request the "OPSEU Educational Weekend".
- Members are responsible for making their own Accommodation and Payment arrangements. Accommodations should be booked no later than **May 2, 2017**. All unreserved rooms will be released for re-sale after this date. OPSEU Policy states that members are responsible for their own rooms AND paying for same, you are also responsible for any cancellation. Failing cancellation, you are responsible for the room charges.
- According to Union Policy, any member living **within** 60 kms of the hotel is entitled to room accommodation for the Saturday night only. Any member living **outside** 60 kms of the hotel is entitled to room accommodation for Friday and Saturday night. Members will be reimbursed for the cost of a twin-shared room only as per OPSEU policy.

CANCELLATIONS (NEW POLICY)

- Notification by a member to cancel course attendance should be received by both the local president and the regional office no later than 48 hours before commencement of the regional school (no later than 9:00 A.M. on the Thursday prior to the weekend school). When a member does not attend and the Regional office has not been notified 48 hours prior to the school's commencement, the member will be assessed a \$50.00 penalty. Extenuating circumstances will be taken into consideration.
- A member cancelling participation must notify the **Wellesley Office, Toronto Regional Office** and their local president on or **before 9:00 a.m. on THURSDAY, JUNE 1, 2017.**

CHILDCARE/ELDER/DEPENDANT CARE

- We encourage the use of the onsite Childcare
- Members will be reimbursed for Child Care at \$10.00 an hour for a maximum of 12 hours and \$40.00 overnight, to a maximum of \$160.00 per 24 hour period.
- Child care claims will be honoured for children up to and including age 16, for whom the member is guardian.
- Friends, family, or professional or Commercial Services or any other arrangement satisfactory may provide care to the member making the claim. Claims may be verified and must be signed by the service provider.
- Members seeking child care through the **Wellesley Office, Toronto Regional Office** for educational must include the completed paperwork with their Course Registration forms.
- **If childcare is requested they must be in attendance with the program. If the child is not in attendance you will be responsible for the full cost of the accommodation.**
- Members who have responsibility for elderly/dependent persons wherever the service is provided, at home, in town or out of town.

- Members will be reimbursed for elder/dependent care at \$10.00 an hour for a maximum of 12 hours, and \$40 overnight, to a maximum of \$160 a day.
- This policy covers the expenses for persons over the age of 16, permanently residing with, and under the care of a member, who are differently-abled and/or aged.

LOST WAGES: *Please note change on application form*

- In order to claim for lost wages, we will require proof from your Employer that you were scheduled to work and the amount of lost wages incurred. OWN TIME IS NOT PAID. Lost wages may be paid for shift workers who are scheduled to work. Shift workers are asked to make every effort to rearrange their schedule to avoid lost wage claims, and to submit proof that their request for a shift change was denied.
- The Regional budget is limited and excessive claims restrict our ability to offer a broader program. Lost wages claims will be limited to a maximum of 10% of the budget for each educational.
- The Regional Education Committee will endeavor to distribute lost wages equitably among locals while taking into consideration equity criteria, the educational needs of locals and the region, and special circumstances that may apply.
- Individual applicants will be awarded lost wages for a maximum one educational per calendar year.
- **TIME OFF ARRANGEMENTS** are to be made by the member. No time off requests will be submitted automatically by OPSEU.
- OPS Members whose lost time application is approved will have a time off letter issued by OPSEU.

EXPENSE FORMS

- A member will be reimbursed for the actual cost incurred for travel by public transportation. As per the policy of the Union, the most economical means of transportation should be used.
- Where a member is required to use his/her private vehicle, he/she may claim for such travel at the current rate. The total distance travelled and destination points are to be indicated on the expense form.
- Members must arrange their own travel and are encouraged to car pool.
- Current Kilometre Rates: one (1) OPSEU member travelling alone \$0.55/km; two (2) OPSEU members, \$0.60/km; three (3) OPSEU members, \$0.65/km; four (4) OPSEU members \$0.70/km; five (5) OPSEU members \$0.75/km.
- **ALL expenses MUST** be submitted on proper Expense Claim Forms.

MEALS

- **BREAKFAST:** Members who stay at the hotel or had to be present for an OPSEU event before 0800 hours (8:00 a.m.) are eligible to claim (\$13).
- **DINNER:** Members who stay at the hotel or had to be present for an OPSEU event past 1700 hours (5:00 p.m.) are eligible to claim (\$29).

ADVANCE

- Indicate the amount required on the Application/ Advance Form and return to the **Wellesley Office, Toronto Regional Office.**



Registration Form for Child Care

Region 5 Weekend Educational

June 3-4, 2017

ALL SECTIONS in this form **MUST** be **fully** completed if requesting family accommodations or child care.

Child(ren)'s Name	Age	M/F	Medical Problems/Allergies/Special Care Needed	Health Care # <u>Required</u>

Have your Child Bring a Favourite Toy

Signature of Parent: _____ Date: _____

Name of Parent: _____

Address: _____

_____, ONTARIO _____

Phone #'s: (home) _____ (work) _____

Please return with your Application/Advance Form to the OPSEU Wellesley Office,
Toronto Regional Office



Human Rights Accommodation Request Form

Event Name: Region 5 June Weekend Educational

Date: (mm/dd/yyyy) June 3-4, 2017

Note: This form is to be completed only if you are requesting an accommodation in accordance with the Ontario Human Rights Code. Sufficient information must be provided to prove the need for the accommodation and to show a link to a code-related ground. If necessary, an Equity Unit Officer will contact you to obtain further information.

Member Name: _____ Local #: _____

Phone # for contact: _____ Email: _____

How do you prefer to be contacted?

☐ Phone

☐ Email

1. Do you have an existing human rights accommodation approved by the Equity Unit (i.e. you have submitted a request form before)? (Check one.)

☐ a) Yes; and I need the same human rights accommodation as previously approved

☐ b) Yes; but I require changes to my previously approved human rights accommodation

☐ c) No; I have never been approved for a human rights accommodation

Note: If you checked (a) above, you do not need to complete the rest of the form but the form still needs to be submitted. If you checked (b) or (c), please finish the form.

2. Please check all the Code-related grounds related to your request:

☐ Disability (including food allergy)

☐ Family Status

☐ Sex / gender (including pregnancy)

☐ Creed or religion

Other (please specify) _____

3. Why do you require a human rights accommodation (i.e. what are your restrictions or limitations)? Please be as detailed as possible.

Note: All information is kept confidential except where necessary to arrange the accommodation or to process expense claims.



Human Rights Accommodation Request Form

4. Do you need this human rights accommodation for this event only or for all future union events? (Check one.)

☐ For this event only

☐ For all future union events

5. What type of human rights accommodation or additional arrangement do you require to allow you to participate fully in union-related activities? (e.g. assistance during emergency evacuation, material in alternate formats, interpreters, arrangement / expenses beyond those provided at the event or through OPSEU policy). Please be as detailed as possible.

6. Please provide any additional information that may assist us in reviewing your request. (Attach any relevant documents.)

Signature of Member _____

Please forward completed forms to : Juliet Feddoes

by fax at : 416-944-0288

or by email : jfeddoes@opseu.org

no later than : April 7, 2017

Alternatively, this form may be sent directly to the Equity Unit via fax at 416-448-7419 or via email to equity@opseu.org.

Note: All information is kept confidential except where necessary to arrange the accommodation or to process expense claims.



Course Descriptions Region 5 Weekend Educational June 3-4, 2017

Stewards 1: Making a Difference in the Workplace (English)

Stewards 1 includes a more detailed description and history of OPSEU's equity-seeking groups. The course continues to support stewards through a range of tools and practical activities. The key aims are to strengthen steward skills to orient a new employee to the union, have effective one-on-one conversations with a cross-section of members, develop a communications strategy to enlist diverse member involvement, and develop approaches to everyday workplace problems. Throughout the course, participants are supported as they develop a profile of their members, clarify the tasks of the steward, find the resources and information in OPSEU, and understand the grievance process and their role in it. Stewards 1 is a prerequisite to Stewards 2 and must be completed before taking Stewards 2. **Participants should bring their collective agreements.**

Délégué Syndical 1: Faire une Différence dans le Milieu de Travail

Ce cours soutient les délégués syndicaux en mettant à leur disposition toute une gamme d'outils et activités pratiques. Les objectifs clés visent à améliorer les aptitudes du délégué afin de l'aider à orienter les nouveaux employés membres du syndicat, à avoir des conversations personnelles efficaces avec toutes sortes de membres, à développer une stratégie de communication qui favorise la participation accrue des membres et à développer des approches aux problèmes quotidiens qui surgissent en milieu de travail. Tout au long de ce cours, on encourage les participants à développer le profil de leurs membres, on les aide à mieux comprendre leurs tâches, à trouver les ressources et les renseignements dont ils ont besoin au SEFPO et à comprendre la procédure de règlement des griefs et leur rôle dans celle-ci. **Les participants sont priés d'apporter le document de leur convention collective.**

Stewards 2: Facing the Employer, Building Member Involvement

Prerequisite: Stewards 1

This revised follow-up to Stewards 1 focuses on investigating and writing a grievance, facing management, and involving members in worksite action. Participants will use their own collective agreements to identify grievances. They will become immersed in an evolving case study in order to interview a grievor, write up a grievance, face the employer at a step 1 and make a presentation on safety issues to the union side of the Joint Health and Safety Committee. They will examine the elements of effective mobilization and develop a campaign strategy for a local. **Participants should bring their collective agreements.**

Stewards 3: Dealing with Discipline

This is an advanced level steward course. It is suggested that participants take Stewards 1 and Stewards 2 prior to signing up for this program. Dealing with Discipline is a skills and knowledge focused workshop that will assist union activists in their duties representing members that are facing discipline up to and including dismissal. The course bridges concepts from Stewards 1 and 2, Basic and Advanced Grievance Handling and Workplace Investigations. **Participants should bring their Collective Agreements to the course.**

Basic Grievance Handling for Union Building

This course is designed to examine the grievance process from a workplace organizing perspective. Grievances are opportunities to build the union. This hands-on course helps members analyze situations to decide whether a grievance is the best approach. They will learn about different types of grievances and the remedies available through the grievance/arbitration process. They will develop technical skills in writing, processing grievances and practice communication to assess whether a member's rights have been violated. **Participants should bring their Collective Agreements to the course.**

Health and Safety: Level One

This course is designed for members and stewards who want to become more involved in health and safety activities in their workplace. There is a strong focus on health and safety legislation to enable participants to use the legislation effectively in their own workplaces. Participants work in groups to explore the legislation and to gain a better understanding of their rights and employers' obligations under the Occupational Health and Safety Act and its regulations. Participants are introduced to the concepts of hazard identification, assessment and control and develop a greater understanding of the components of an effective health and safety system.

Duty to Accommodate: A Tool for Inclusive Workplaces

Provincial legislation and existing case law require employers and unions to provide accommodation short of undue hardship. This interactive course examines the roles and responsibilities of the employer, the union and the member in accommodating members with disabilities and all other protected groups under the Ontario Human Rights Code. It builds activists' skills to support members requiring an accommodation, and to deal with employer resistance to accommodation in the workplace.

Cross-Cultural Communication at Work: A Union Perspective

In our workplaces, unions, and communities, we experience daily interactions with diverse groups including co-workers, and our union sisters and brothers. There are moments when these interactions lead to miscommunication, and misunderstanding about cultural expressions and social cues. In order to work through some of these communication challenges, an introductory course, Cross-Cultural Communication has been designed. Participants will work through case scenarios to develop strategies designed to improve their cross-cultural communication.

OPSEU MEMBER PORTAL – HOW TO REGISTER

Updated: March, 2017

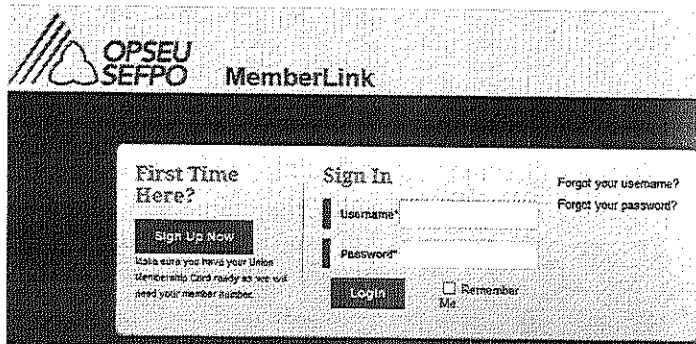
BEFORE YOU BEGIN

You will need three pieces of information to register successfully and gain access to the OPSEU Member Portal. You need to know your **OPSEU Union Number** which can be found on your OPSEU Membership Card. You will need your **First Name** and **Last Name** – exactly as it is entered in our membership database. Finally, you need your preferred **Secure Email Address** which is not your Employer's email address. If you need assistance you can call the nearest OPSEU Regional Office for assistance.

Once you have the necessary information at hand, open a Web browser and go to:

<https://members.opseu.org>

Before you can Sign-In you must Sign-Up.
Click on the [Sign Up Now] button.

The screenshot shows the OPSEU MemberLink portal. At the top, there is a logo for OPSEU SEFPO and the text 'MemberLink'. Below this, there are two main sections: 'First Time Here?' and 'Sign In'. The 'First Time Here?' section has a 'Sign Up Now' button and a note: 'Make sure you have your Union Membership Card ready as we will need your member number.' The 'Sign In' section has fields for 'Username*' and 'Password*', a 'Login' button, and a 'Remember Me' checkbox. There are also links for 'Forgot your username?' and 'Forgot your password?'.

Union #: Enter your OPSEU Union number.

First Name: Enter your first name as recorded in our membership database.

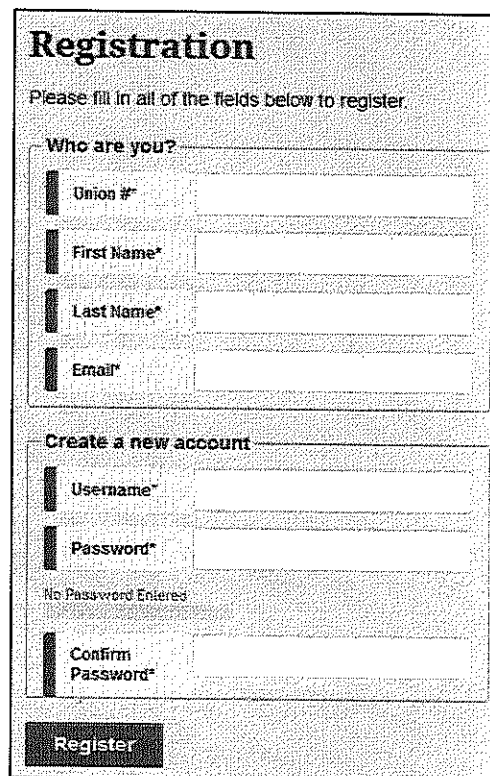
Last Name: Enter your last name as recorded in our membership database.

Email: Enter your preferred secure personal Email Address and ensure this is not an email address provided to you by your Employer. Please know that your account activation link will be sent to this address.

Username: Create a valid Username. (NOTE: You are free to create any logon name you wish. It does not have to be the same as your actual name. For example you can use your Union# as your Username.)

Password: Create a valid password.

Confirm Password: Re-enter the password.

The screenshot shows the 'Registration' form. At the top, it says 'Registration' and 'Please fill in all of the fields below to register.' Below this, there is a section titled 'Who are you?' with fields for 'Union #*', 'First Name*', 'Last Name*', and 'Email*'. Below this is a section titled 'Create a new account' with fields for 'Username*', 'Password*', and 'Confirm Password*'. There is a note 'No Password Entered' next to the Password field. At the bottom, there is a 'Register' button.

Once you have registered, you will receive an email with an activation link at the address you provided. Once you activate your account, you can Sign-in using the Username and Password you created. *Keep this information safe and do not share it with anyone.*



ONLINE EXPENSE TUTORIAL

FY 2017

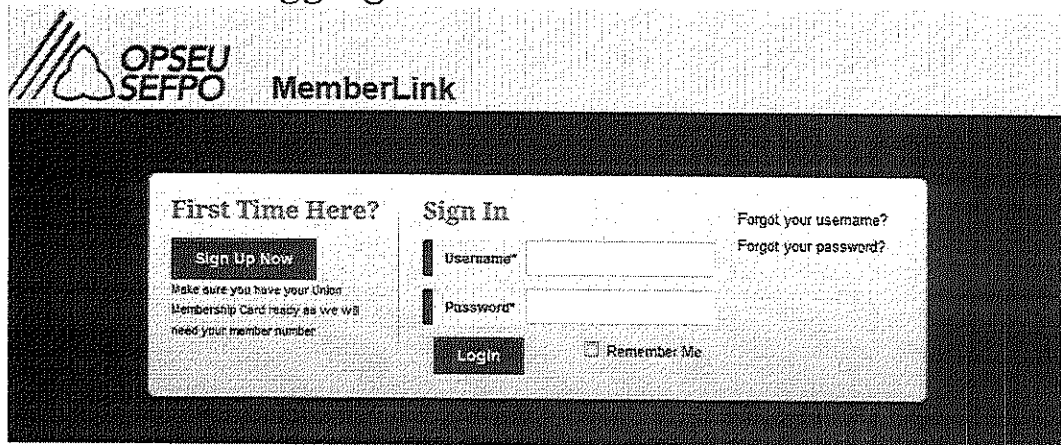
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ONLINE EXPENSE CLAIM TUTORIAL

Logging into the Member Portal



REGISTRATION

BEFORE YOU BEGIN

You will need two pieces of information to register successfully and gain access to the OPSEU Member Portal. First, you will need to know your **OPSEU Union Number**. You can find this number on your OPSEU Membership Card. And, you will need your **First Name** and **Last Name- exactly** as it is entered in our membership database. If you need assistance, you can call the nearest OPSEU Regional Office for assistance. Once you have the necessary information at hand, open a web browser and go to:

<https://members.opseu.org> – which is seen in the picture above

Before you can Sign-In you must Sign-Up. Click on the **[Sign Up Now]** button.

Union ID: Enter your OPSEU Union number

First Name: Enter your first name as recorded in our membership database

Last Name: Enter your last name as recorded in our membership database

Username: Create a valid Username. (Note: You are free to create any logon name you wish. It does not have to be the same as your actual name. For example you can use your Union # as your Username.)

Password: Create a valid password

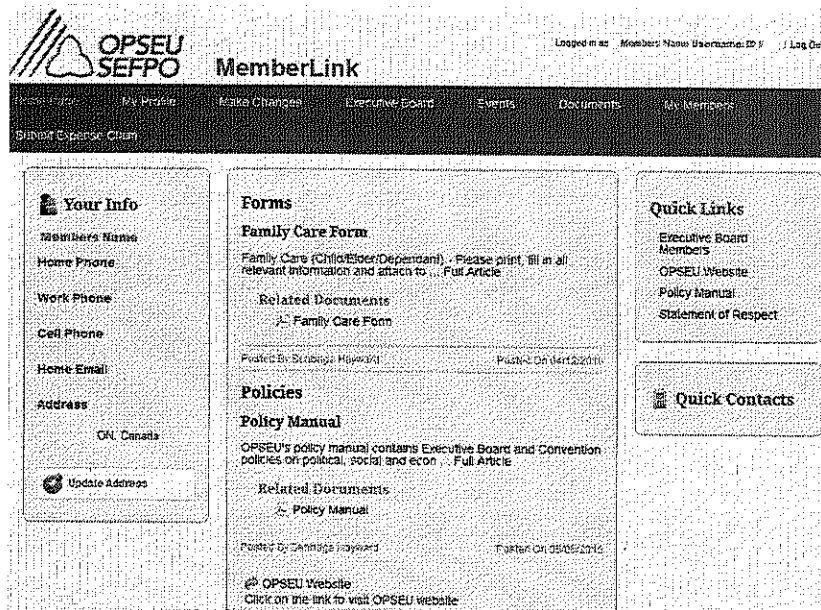
Confirm Password: Re-enter the password

Keep this information safe and do not share it with anyone. After completion of registration, please enter in the Username you've selected and the Password.

ONLINE EXPENSE CLAIM TUTORIAL

Getting to Know Your Portal

MEMBER PORTAL HOME SCREEN



After logging into your Member Portal account, you will be brought to this screen. This is your member home page where you will have access various kinds of information.

The home page header categories are as follows:

- **Home Page:** Directs you back to your home page
- **My Profile:** Where you are able to view your general information (jobs, positions, advances, expenses, etc.)
- **Make Changes:** Where you are able to update your address, password, email, and username
- **Executive Board:** different Committees and their members, and Meeting Minutes
- **Events:** Where you can view your Registered Events and Available Events
- **Documents:** Where you are able to access and download various documents
- **My Members:** Lists all the members in your Local
- **Submit Expense Claim:** Where you are able to view your submitted claims and submit online expense claims

To submit an expense claim, please click on the header category [**Submit Expense Claim**].

ONLINE EXPENSE CLAIM TUTORIAL

Submitting an E-Claim

FIRST STEPS

Before you start the submission process, please ensure that all receipts have been scanned and are ready to be attached to your electronic claim.

After submitting your e-claim, the status changes from "Add New Claim" to "Pending." You are able to see if the claim has been processed the status will then change from "Pending" to "Paid."

Please note that if the Claim Status says "Not Attended" please contact the event coordinator to have the status changed so you are able to submit the online e-claim.

Submit Expense Claims

- We are displaying eligible events for the last six months.
- Claims may be submitted online for up to three months after the event.
- Claims may only be submitted for events that the member attended.
- Please contact the accounting department in order to submit a claim for an event that is more than three months old or if attendance was not recorded properly.
- To download the latest version of the Advance Request Form, Family Care Form, or Direct Deposit Agreement, please check the Documents menu.

Search:

Event Name	Start Date	End Date	Claim Status	Attended
Davi Test Event	09/25/2016 0:00	09/30/2016 0:00	Did not attend	No
TEST it Event	09/26/2016 0:00	09/30/2016 0:00	Add New Claim	Yes

Showing 1 to 2 of 2 entries

When you have entered the Submit Expense Claim page, please click on [Add New Claim] to begin the submission process.

ADDING EXPENSES TO YOUR E-CLAIM

As soon as you've entered into your e-claim, you are now able to add your expenses to the claim. The expenses that you will be able to enter into are:

- Mileage
- Meals
- Family Care
- Misc. Expenses: which include airfare, cellular phone, hotel, parking, print/postage, registration/affiliation fees/supplies, taxi/train/bus, own time, and lost wages

ONLINE EXPENSE CLAIM TUTORIAL

OPSEU SEFPO MemberLink

Logged in as Member Name (Username: ID #) | Log Out

Home Page My Profile Make Changes Executive Board Events Documents My Members

Submit Expense Claim

Add New Claim

TEST IT Event

Mileage

Date	Number Of Passengers	Km Driven	Rate	Value	No Parking Description	Passengers
<input type="text"/>						

Meals

Date	Child Under 12	Child Name	Breakfast	Breakfast Rate	Lunch	Lunch Rate	Dinner	Dinner Rate	Value
<input type="text"/>									

Please note that **ALL** expenses require a document to be attached, except mileage when free parking is given. These documents are the scanned receipts, approval emails, and etc.

At this time any grievance, arbitration, honorariums, OPSEU childcare worker expense claims will need to be submitted on paper expense claims.

MILEAGE EXPENSE

If you are submitting a mileage expense, please click [[Add New](#)] under the Mileage section. The pop-up below appears and this is where members are now able to input the mileage for each day.

For each date of travel, members must submit a parking receipt or explanation of parking and location in order for tracking purposes and to be ensure the expense is properly processed. Please provide the “**To**” and “**From**” destination points to be fully reimbursed for mileage.

ONLINE EXPENSE CLAIM TUTORIAL

Mileage

Date: 2016-10-07

* Number of passengers does NOT include the driver. Choose 0 (zero) if driving by yourself (no passengers).

Number Of Passengers:

Km Driven:

Rate: \$ 0.00

Value: \$ 0.00

* You must submit parking receipt under the Misc. Expenses section if you claim mileage. If no parking receipt, please provide explanation in the Note below. Also provide "To" and "From" destination points in the note below.

Example Submission: For example, you've traveled November 7th, 2016 to an event with two passengers from home to OPSEU Head Office. You would input the data as follows- distance traveled with two members is 200km. the two members is Bob Last and Susan First from Local 000. The system automatically populates to the amount you are to receive for the distances and passengers traveled with.

Mileage

Date: 2016-10-07

* Number of passengers does NOT include the driver. Choose 0 (zero) if driving by yourself (no passengers).

Number Of Passengers: 2

Passengers

Name	Local
Bob Last	000
Susan First	000

Km Driven: 200

Rate: \$ 0.65

Value: \$ 130.00

* You must submit parking receipt under the Misc. Expenses section if you claim mileage. If no parking receipt, please provide explanation in the Note below. Also provide "To" and "From" destination points in the note below.

From my home to OPSEU Head Office. No parking receipt because there is free parking at Head Office.

If you've stayed overnight at a hotel and received free parking at the hotel, you must state that in the notes section and input a new expense for the return mileage. Also note that if you are traveling alone, please select "0" for the number of passengers. After you've inputted all the information click "Save."

ONLINE EXPENSE CLAIM TUTORIAL

MEAL EXPENSE

To submit a Meal expense, click [\[Add New\]](#) under the meals section and the pop-up below will appear.

Meals

Date* 2016-10-07

If this meal claim is for a child age 12 or under, select Yes for Child Meal Claim.

☐ Child Under 12

Child Name

☒ Breakfast Breakfast Rate \$ 13.00

☒ Lunch Lunch Rate \$ 19.00

☒ Dinner Dinner Rate \$ 29.00

Value \$ 0.00

Save Cancel

Please select the date of the expensed meals (please note that each date of meals to be expensed must be inputted separately). After the date is selected, please click the boxes on the left to select the meals that are to be expensed. After the boxes are selected the amount will automatically populate and you will be able to see the value or amount to be expected for the date.

Please note: that if you are claiming children meals, members are to add the child name in the section provided. If the member's child is under 12, please select the "Child Under 12" check box. As per OPSEU policy, children 12 and under are entitled to 50% of the standard meal rates. Also, members must "Add New" for each day of meals they are claiming for both themselves and their child(ren).

Meals

Date* 2016-10-07

If this meal claim is for a child age 12 or under, select Yes for Child Meal Claim.

☒ Child Under 12

Child Name [Insert Child Name Here]

☒ Breakfast Breakfast Rate \$ 6.50

☒ Lunch Lunch Rate \$ 9.50

☒ Dinner Dinner Rate \$ 14.50

Value \$ 0.00

Save Cancel

After inputting all the information in the meal expense pop-up, click "save" to continue.

Please note that if you are claiming any expenses for a dependent, you must complete and include the family care form with each e-claim. Please see the family care section for more information.

ONLINE EXPENSE CLAIM TUTORIAL

FAMILY CARE EXPENSE

If a member has incurred any family care expenses during an OPSEU event and they are claiming expenses, the family care form must be completed and attached to each e-claim. Members are able to download and print the family care form in the portal under the documents header.

The screenshot shows a web form titled "Family Care". Below the title is a note: "Each family care submission covers one day only, 12:00 am - 11:59 pm. If your care extends over multiple days, please enter one record for each day." There is a checkbox labeled "OPSEU Provided Child Care" which is checked. Below this are input fields for "Date*", "From (Hour)*", "To (Hour)*", and "Amount*" (which shows "\$ 0.00"). There is a "Document" section with a "Browse..." button and the text "No file selected." Below the "Browse..." button is an "Add" button with an upward arrow icon. At the bottom right are "Save" and "Cancel" buttons.

Click [\[Add New\]](#) under the family care section to continue. If **OPSEU has provided child care** at the event, please select the check box at the top that states "OPSEU Provided Child Care" and attach the family care form. You will only need to complete the bottom portion of the family care form and include your signature. If **you've received family care at your residence**, please select the date and the hours of when family care was provided and then attach the family care form. After inputting the information, the amount will automatically populate with the current OPSEU family care rates.

The form is titled "Family/Attendant Care Claims" with the instruction "Please complete for all family care claims (please print)". It is divided into two main sections: "Care Provider" and "Children / Dependents". The "Care Provider" section includes fields for Name, Address, City, Postal Code, Telephone, and Signature of Care Provider. The "Children / Dependents" section is a table with four rows, each with fields for Name and Age. At the bottom is a "Member confirmation" section with a statement: "I affirm that without such family care I would have been unable to attend this OPSEU activity." followed by fields for Signature and Date.

Children / Dependents	
Name	Age
Name	Age
Name	Age
Name	Age

You **must** create a new expense for each date that Family Care was provided or received.

ONLINE EXPENSE CLAIM TUTORIAL

MISCELLANEOUS EXPENSES

This section is for members to claim:

- Hotel Expenses
- Parking Expenses
- Train/Taxi/Bus Expenses
- Airfare Expense
- Cellular Phone Expense
- Print/ Postage Expense
- Registration/Affiliation Fees Expenses
- Supplies Expense
- Own Time / Lost Wages

Please note that all these expenses require a receipt or documentation in order to be reimbursed. If you have **any** approval emails or other documentation please also attach it to the expense.

Note: All members who are claiming Own Time will be paid if the member is using lieu days, accumulated credits, or vacation days. Own Time **will not** be reimbursed for an unpaid work day. Claims for both Own Time **must** be supported with documentation from the employer confirming the type of credit being used. Lost wages **must** also be supported with documentation from the employer confirming the standard rate of pay and the usual hours worked for the date in question.

Hotel Expense

To Submit a Hotel Expense, click [\[Add New\]](#) in the Misc. Expense section and select "Hotel" in the drop down menu. Input the date of stay, amount charged, and browse and add the scanned copy of the receipt.

If you have a standing **HR Accommodation**, please make note of the accommodation in the Notes portion. Please also ensure that you've attached a zero balance receipt for full reimbursement.

The screenshot shows a web form titled "Misc. Expenses". It contains the following fields and values:

- Date***: 2016-10-07
- Type***: Hotel (selected from a dropdown menu)
- Amount***: \$ 190.92
- Document**: A file named "775045_1499424707_hotel invoice.pdf" is attached.
- Notes***: Single rates given as per HR Accommodation

At the bottom right of the form are "Save" and "Cancel" buttons.

ONLINE EXPENSE CLAIM TUTORIAL

Note: Just a reminder, if you've received parking at the hotel please **separate** the expenses and include the hotel receipt with the parking charge in the Misc. Expenses—parking expense.

Parking Expense

To submit a Parking Expense, click [Add New] in the Misc. Expense section and select "Parking" in the drop down menu. Please input the date, the amount, and attach applicable parking receipts for the date inputted.

The screenshot shows the 'Misc. Expenses' form. The 'Date' field is set to '2016-10-07'. The 'Type' dropdown menu is set to 'Parking'. The 'Amount' field is set to '\$ 32.16'. Under the 'Document' section, a file named '775145_144042407_hotel-invoice.pdf' is listed. Below this, there is a 'Browse' button and a text field that says 'No file selected.' To the right of the 'Browse' button is a 'Remove' button. Below the 'Browse' button is an 'Add' button with an upward arrow icon. Below the 'Add' button is a 'Notes' text area containing the text 'Hotel / parking receipt attached also, additional parking list receipt attached'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

If you have multiple parking receipt documents, you can attach multiple documents by select the "Add" button located below the "Browse" button.

Taxi / Train / Bus Expense

To submit a taxi/train/bus expense, please note that all expenses require a document to be attached. Remember to provide the information of the type of travel you are claiming, either bus, train or taxi in the notes portion.

Note: if more than one method of transportation was used, please add the total amount and attach all applicable receipts that would equal the total amount claimed.

The screenshot shows the 'Misc. Expenses' form. The 'Date' field is set to '2016-10-07'. The 'Type' dropdown menu is set to 'Taxi/Train/Bus'. The 'Amount' field is set to '\$ 500.00'. Under the 'Document' section, three files are listed: 'Busreceipt.jpg', 'Taxireceipt.jpg', and 'Trainreceipt.jpg'. Each file has a 'Browse' button to its left and a 'Remove' button to its right. Below the 'Browse' buttons is an 'Add' button with an upward arrow icon. Below the 'Add' button is a 'Notes' text area containing the text 'Taxi / train / and bus receipts attached'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

ONLINE EXPENSE CLAIM TUTORIAL

Advances

If OPSEU has issued you an advance, you will not need to input anything regarding the advance on your e-claim. Each advance that is issued is for a specific event and will be deducted as the expense is being processed.

To receive an advance, please complete the advance form and forward it to advances@opseu.org for review and processing.

Final Review of Claim

After inputting all applicable expenses for the e-claim, please click on the **[Submit]** button located at the bottom of the page.

Date	Type	Amount	Document	Notes
2016-03-05	Hotel	160.00	Hotel Receipt.pdf	Hotel Receipt for overnight stay. Delete
2016-03-05	Parking	30.00	Hotel Receipt.pdf	Parked at Hotel. Delete
2016-03-05	Taxi/Transit/Bus	22.00	Taxi receipt.png GO Transit fare pay GO Bus receipt.png	Receipt for taxi, GO Bus receipt, and TTC transfer. Delete

Add New

Submit **Cancel**

After submitted the e-claim, you are able to do a final review of all expenses submitted for the claim. By selecting the **[Confirm]** button after review, you have consented that all the expenses for the e-claim have been inputted and at this time has now been submitted to Head Office for review.

Misc. Expenses Total:	\$ 222.00
Claim Total:	\$ 617.00

Confirm **Back**

After the e-claim has been submitted, you will be located back to the Submit Expense Claim page and the status of the claim will now have changed from "Add a New Claim" to "Pending Approval".

ONLINE EXPENSE CLAIM TUTORIAL

E-Claim TIPS

QUICK TIPS

➤ **What happens if the event claim status states "Did Not Attended"?**

OPSEU will update all attendance registers within 48 hours after the event has concluded. After they have been updated, members will then be able to submit an online expense claim. If the event register has yet to be updated after the allotted time period, please contact event coordinator.

➤ **What happens if I have forgotten to attach an additional receipt to my e-claim? What can I do?**

If members have forgotten to submit a receipt for an e-claim they are unable to re-submit the receipt via Member Portal. For reimbursement, forward all receipts to claims@opseu.org and include members name, ID number, date of event, and name of the event.

➤ **Ensure the following for FULL reimbursement:**

- All hotel receipts have a zero balance remaining
- The members name is on the receipt
- Dates of the receipts are correct
- Train / Airfare receipts are itemized
- All the information and notes have been provided to the clerks for accurate processing
- The family care form has been attached to the claim for any family care relevant expenses

If all these have been done correctly and there is still an issue, please contact claims@opseu.org

➤ **I have pre-approval to travel prior the event date, how do I submit these expenses?**

You are able to submit expenses for up to seven days before and after the event date. This will allow for any additional expenses incurred due to travel or extenuating circumstance. Please **attach** pre-approval emails to the e-claim for full reimbursement.