

## How to Get Reimbursed: Continuing Education

### Overview

Pennsylvania College of Technology will reimburse PA Weatherization Assistance Program workers (agency staff and subcontractors) for **optional Continuing Education *beyond* normal PA WAP training and certification requirements**. Continuing Education reimbursement must be pre-approved and covers expenses such as conference fees, professional development course fees, certification exam fees, and travel to/from the event.

### Examples of Continuing Education (CE)

- National and regional conferences (such as BPA Home Performance Conferences, National Community Action Partnership (NCAP) events, National Association for State Community Service Programs (NASCS) events, Energy OutWest Conferences)
- BPI trainings, certificates, and certification testing *beyond* normal PA WAP training and certification requirements (e.g. Healthy Home Evaluator, Building Analyst Technician, Building Analyst Professional) \*
- General computer training to improve staff/worker skill level with computer programs/software
- Leadership-type courses for office staff, supervisors, and those working toward becoming a supervisor
- Training that is specific to improving teambuilding and effectiveness of communication

**\*Note:** BPI Home Energy Professional training courses and other required training (listed on Agency Training Plans) are not considered Continuing Education. For more information on reimbursement for required in-person training, see ***How to Get Reimbursed: PA WAP Hands-on Training Travel Expenses***.

### Continuing Education - PA WAP Agency Approval Process

The College manages the PA WAP's Continuing Education budget each program year.

The College will process and track reimbursements and maintain a centralized record in Concur of the total amount encumbered and spent. All Continuing Education funds are on a first-come, first-served basis, as long as funds are available.

To encourage annual planning of Continuing Education and timely spend down of these funds, and to provide the maximum amount of flexibility for workers, a deadline is in place for requesting Continuing Education funds.

## Timeline for Requesting Continuing Education Funds

**March 31:** Last date for all workers/subcontractors to submit Requests in Concur to encumber funds.

After this deadline, all remaining *unencumbered (unapproved)* funds will be closed out from the Continuing Education budget to ensure spend down and to cover other PA WAP network needs approved by DCED.

### **What is reimbursable?**

Reimbursable expenses include conference fees, course fees, training materials, certification exam fees, and travel expenses to/from the event.

Agency staff wages during Continuing Education events are reimbursable, but are handled through a separate process. See ***How to Get Reimbursed: Wages during PA WAP Training***.

Subcontractor wage reimbursement for Continuing Education is not available this program year.

### **Travel Expense Reimbursement**

Only amounts actually spent may be claimed. **Detailed (itemized) receipts showing full payment are required for all travel expenditures.** Credit card slips and statements are not acceptable in lieu of detailed receipts. All receipts must include the name of the vendor, date of service, and amount paid.

When it is impossible to secure a detailed receipt, use a *Declaration of Missing Receipt Form*.

### **Mileage**

- Use an Agency vehicle to travel unless there are extenuating circumstances. No mileage reimbursement will be provided for Agency vehicles (it is covered under an Agency's Program funding).
- If a personal or private business vehicle is used, the rate per mile follows IRS guidelines for business rates: <https://www.irs.gov/tax-professionals/standard-mileage-rates> (updated annually January 1<sup>st</sup>).
- Use the mapping feature in Concur to calculate mileage reimbursement. Mileage will only be reimbursed for the main roundtrip. (Local mileage to/from hotel to the training site is not reimbursable.)

### **Airfare and Car Rentals**

- Take the cheapest method of transportation that is reasonable.
- Economy flights only. Upgraded tickets will not be reimbursed.
- Flights must align with the business days of the continuing education opportunity. If you add personal time to your trip, you **MUST** acquire a comparison quote to show that the additional days amount to LESS or EQUAL than what it would have been for the standard business days.
- One airline baggage fee, each way, will be reimbursed.
- Car rentals must be the economy rate. Upgraded rentals will not be reimbursed.

### **Other Vehicle-related Expenses**

- Parking fees
- Highway tolls (EZ Pass: Attach an EZ Pass account statement with relevant tolls circled)

- Ground transportation to/from the airport and to/from the place of lodging and the conference/event; anything beyond that is the responsibility of the traveler.

### **Travel Allowance / Per Diem (for lodging, meals, and/or incidental expenses)**

**Eligibility:** Per diem reimbursement will only be provided if your trip length is *12 or more hours* (starting from when you depart your home/office and ending when you return to your home/office).

**Reimbursement will follow [GSA Per Diem rates](#) for the training location (updated each October 1<sup>st</sup>).** Per diem allowances are not flat rates -- only amounts actually spent may be claimed.

#### **Lodging**

- Follow the GSA max allowable per diem, excluding taxes
  - If you cannot find reasonable lodging within the GSA rate, you must provide documentation of three (3) comparable quotes to show you chose the most reasonable option available
- Additional costs for upgraded room accommodations are non-reimbursable.
- Hotel Taxes: These taxes fall outside of the per diem lodging rate. When submitting expense reports, you must itemize hotel taxes in the Concur software.

#### **Meals and Incidentals**

- Follow the GSA max allowable per diem
- The first and last calendar day of travel is calculated at 75% the per diem rate
- **Reimbursement for alcoholic beverages is prohibited** – cross these out on the receipt and deduct from the meal total
- Meal tips are limited to 20% of the eligible meal total
- Incidental expenses include baggage handling (limited to reimbursement of \$1.50/bag) and hotel cleaning service gratuities (limited to \$5/day)

For more information on the travel policy, please refer to GSA'S Per Diem webpage ([www.gsa.gov/perdiem](http://www.gsa.gov/perdiem)) and the *PA DCED Directive 2011-1 Federal Travel and Subsistence Allowance*, dated August 30, 2011.

#### **Receiving Reimbursement**

Pre-approval Requests are required for all Continuing Education opportunities, which will be routed for approval through the PA WAP Agency Weatherization Director/Coordinator and PA DCED.

Reimbursement checks will be made out to the individual that traveled (or the individual that submitted the expense report, if that individual verifies they were responsible for all travel expenses submitted).

Large expenses of \$500+ (specifically, conference registration fees and airline tickets) may be reimbursed prior to the event, with the remaining travel expenses submitted after the event (a maximum of two Expense Reports).

Expense reports must be submitted within 10 business days after the training.

**Year-end Deadline:** All end-of-the-fiscal-year expense reports must be submitted by **June 30**. **Reimbursement requests received after this date cannot be processed.**

**Please view this video for a Step-by-Step tutorial on how to submit a Request in concur:**

Concur log-in site: <https://www.concursolutions.com>

Chrome or Safari are preferred internet browsers.

**Username:** provided in your Concur welcome email (all usernames will end in **@pawap.edu**)

**Password:** provided in your Concur welcome email

If you ever forget your username, click “Forgot username?” and enter your email from your Agency’s Training Plan. Concur will send you an email with your Username. If you ever forget your password, click “Forgot password?” and enter in your Username. Concur will send an email to you (your email address on your Agency’s Training Plan) with a link to reset your password.

**Concur accounts are created for individuals listed on a PA WAP Agency’s Training Plan.**

If you have not received a Concur welcome email with your log-in information, check your email spam folder, and then contact your Agency Weatherization Director/Coordinator to make sure you are listed on their annual Training Plan.

For other questions related to training expense/travel reimbursement or general Concur troubleshooting support, contact the Pennsylvania College of Technology at [wdbuildingperformance@pct.edu](mailto:wdbuildingperformance@pct.edu) or visit our [PA Weatherization webpage](#).