



PA WAP Continuing Education Reimbursement Guidelines

July 1, 2022 – June 30, 2023



Overview

The Clean Energy Center at Pennsylvania College of Technology will reimburse PA WAP agencies for conference fees, professional development tuition/course fees, training material fees, certification exam fees, and/or travel for PA WAP workers and subcontractors for approved continuing education (CE) opportunities during the July 1, 2022 – June 30, 2023 timeframe.

What types of continuing education (CE) opportunities are eligible for reimbursement?

- National and regional HPC Conferences
- National Community Action Partnership's (NCAP) 2022 Annual Convention
- National Association for State Community Service Programs (NASCSPP) 2022 Annual Conference
- Energy OutWest 2022 Conference
- BPI Building Analyst I training and certification testing
- BPI Healthy Home Evaluator (HHE) training and certification testing
- BPI Building Science Principles Certificate of Knowledge reference materials and exam
- 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

Pre-Approval Requirements

For all CE opportunities, individuals must request pre-approval by completing a **Request in Concur** with information regarding anticipated events/trainings and estimated expenses (give your best guess based on mileage, per diem for the destination location, and other known costs).

Worker and subcontractor Requests must be approved by the Agency Wx Director/Coordinator in Concur. PA DCED will review the Request and provide a decision on whether the Request is an approved use of continuing education funds. Individuals can track the approval of a Request in Concur.

Reimbursement will only be issued after receiving DCED's approval and after expenses have been incurred.

Agency Continuing Education Funding Allocation

Each PA WAP Agency has been provided with an initial allocation (based on historical Continuing Education expenditures) to spend this fiscal year on direct-hire workers as well as subcontractors.

The Clean Energy Center will process and track reimbursements by Agency, and maintain a centralized record in Concur of the total amount encumbered and spent per Agency.

Agency Wx Directors/Coordinators can view their own Agency's Budget Summary in Concur with the total amount of Continuing Education funding that has been encumbered and spent.

Re-allocating Continuing Education Funds

In order to encourage annual planning of Continuing Education and timely spend down of these funds, and to provide the maximum amount of flexibility for agencies, there is a timeline in place to re-allocate Continuing Education funds based on network needs

Timeline for Re-allocating Continuing Education Funds

July 1, 2022 – January 31, 2023: Each Agency can be reimbursed up to their initial allocation for pre-approved continuing education opportunities. Agencies are strongly encouraged to submit all pre-approval Requests in Concur no later than January 31st in order to encumber CE funds into the future.

February 1, 2023: All *unencumbered (unapproved)* continuing education funds will be placed in a general pool of money that will be approved first come, first served until all remaining funds are encumbered. Workers and subcontractors must encumber these funds by submitting a Request in Concur.

March 31, 2023: Last date for all workers/subcontractors to submit Requests in Concur to encumber funds.

April 1, 2023: 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.

Eligible Expenses for Continuing Education

- Reimbursable expenses include conference fees, course fees, training materials, certification exam fees
- Attach detailed receipts that show full payment. All receipts must include the following:
 - Name of vendor
 - Name of PA WAP worker
 - Date of service
 - Amount paid
 - Credit card slips and statements are not acceptable in lieu of detailed receipts

Wages

- **Agency staff wage reimbursements are not submitted through Concur.** Wage reimbursements requests are handled separately by PA DCED. Contact RA-wxmail@pa.gov for guidance.

Are there reimbursement limits?

There is no limit on Continuing Education reimbursement per individual or per opportunity as long as the total for each Agency does not exceed their allocation (unless additional funds are approved).

Only amounts actually expended may be claimed. Detailed receipts that show payment are required for all continuing education opportunity reimbursement requests.

Travel Expense Reimbursement

Mileage

- Use a WAP agency vehicle to travel unless there are extenuating circumstances.
- If a government-owned vehicle is used, no mileage reimbursement will be provided.
- If a personal 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 1st).

- 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.)

Out of State Travel

- Traveler must 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.

Per Diem Reimbursement Eligibility: Per diem travel reimbursement will only be provided if you are in a travel status for more than 12 hours. Eligibility starts when you depart your home, office, or other authorized point and ends when you return to your home, office, or other authorized point.

Reimbursement will follow [GSA Per Diem rates](#) for the training location (updated each October 1st):

- Allowances for subsistence are not flat rates -- **Only amounts actually expended may be claimed.**
- **Detailed receipts are required for all travel expenditures.**
- When it is impossible to secure a required receipt (these instances should be rare), a complete explanation is required. Use a **Declaration of Missing Receipt Form**.
 - Examples: Vending machines, parking meter, or unmanned toll booth.
- If the city or county you are looking for is not listed on the GSA per diem rate page, then the standard continental U.S. rate applies.

Lodging

- Follows the GSA max allowable per diem, excluding taxes
- Expenses are reimbursed at actual cost
 - Detailed receipts from lodging are required
 - Upgraded accommodations at an additional cost are not allowed
- Hotel Taxes: Reimbursable as a miscellaneous expense (outside of the per diem lodging rate)

Subsistence (Meals and Incidentals)

- Follows the GSA max allowable per diem. **This is not a flat rate - Only amounts actually expended may be claimed. Detailed (itemized) receipts are required for meals.**
- The first and last calendar day of travel is calculated at 75% the per diem rate.
- **Reimbursement for alcoholic beverages is prohibited**
- Incidental expenses include:
 - Baggage handling and gratuities (limited to reimbursement of \$1.50 per piece)
 - Gratuity on meal expenses (limited to 20% of meal)

Miscellaneous

- Miscellaneous expenses are excluded from the per diem allowance. Examples of miscellaneous expenses include:
 - Hotel taxes
 - Parking fees
 - Ground transportation to/from the common carrier terminal, and to/from the place of lodging and the conference/seminar/meeting

- Highway tolls (EZ Pass: Attach an EZ Pass account statement with relevant tolls circled)
- When claiming miscellaneous expenses without a detailed receipt, a full explanation is required

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

Receiving Reimbursement

- All Pre-approval Requests and Expense Reports must be submitted via Concur.
- Only CE events that have been approved via a Pre-Approval Request will be reimbursed.
- Use of personal or Agency funds to pay such expenses as conference registration fees and airline tickets will not be reimbursed until after the completion of the travel, with the exception of the **HPC National Conference registration fee and corresponding flight expense**, which may be reimbursed prior to the event as a separate Expense Report.
- For each continuing education event, submit all expenses (i.e. conference fees, course fees, exam fees, travel expenses) in one Expense Report via Concur (except for the HPC Conference as noted above).
- Reimbursement checks will only be made out to the individual that paid for the educational opportunity (no reimbursement to agencies).
- Timeframe: Expense reports must be submitted within 10 business days after the CE event.
- **Year-end Deadline:** All end-of-the-fiscal-year expense reports must be submitted by **June 30, 2023**.
Reimbursement requests received after this date cannot be processed.

Concur

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

Chrome or Safari are preferred browsers.

Username: provided in your Concur welcome email

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 automatically 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 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 Clean Energy Center at cleanenergy@pct.edu or visit our [PA Weatherization webpage](#).