


PA WAP Clean Energy Center Hands-on Training Travel Reimbursement Guidelines July 1, 2023 – June 30, 2024



Overview

The Clean Energy Center at Pennsylvania College of Technology will reimburse Weatherization Assistance Program workers (agency staff and subcontractors) for travel expenses to attend any **required hands-on training and Home Energy Professional certification exams conducted at Clean Energy Center lab sites** as well as PA WAP-sponsored in-person statewide and regional meetings.

Examples of Clean Energy Center Hands-on Training

- Home Energy Professional training program courses, such as (but not limited to):
 - Weatherization Tactics
 - Blower Door and Pressure Diagnostics
 - Residential Heating Systems – Levels II and III
 - Home Energy Auditor Field Capstone
- EPA RRP Lead (Initial and Refresher)
- Certification exams for HEP Energy Auditor and Quality Control Inspector

What is reimbursable?

Reimbursable expenses include meals, lodging, turnpike tolls, and business mileage to/from required training.

Agency staff and subcontractor wages during HEP courses are reimbursable, but are handled through a separate process with PA DCED. **Wage reimbursement is not submitted to the Clean Energy Center or through Concur.** Contact PA DCED at RA-wxmail@pa.gov or your PA WAP Agency for guidance.

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 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.)

Other Eligible Vehicle-related Expenses

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

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 1st). 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 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) and the *PA DCED Directive 2011-1 Federal Travel and Subsistence Allowance*, dated August 30, 2011.

Receiving Reimbursement

Pre-approval requests are not required for Clean Energy Center hands-on training travel reimbursement.

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).

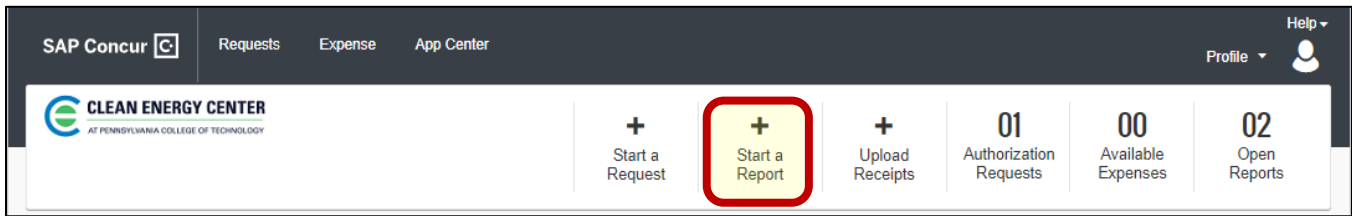
Expense reports must be submitted within 10 business days after the training.

Year-end Deadline: All end-of-the-fiscal-year expense reports must be submitted by **June 30, 2024**.

Reimbursement requests received after this date cannot be processed.

Using Concur software to submit Expense Reports

All Expense Reports must be submitted via **Concur**. After logging into Concur, click the **+ Start a Report** button.



In the **Report Name**, type the name of the course.

For **Trip Purpose**, choose **Clean Energy Center Hands-on Training**.

In the **Comments** box, type in the postal mailing address for the payment check.

If you have **meal, hotel, or other incidental expenses**: select **“Yes, I require Travel Allowance”**

A screenshot of the 'Create New Report' form. The form has several sections: 'Create From an Approved Request', 'Report Name' (with 'Weatherization Tactics' entered), 'Report Total', 'Comments To/From Approvers/Processors' (with a text area containing 'Type in the mailing address for the payment here.'), and 'Travel Allowance' (with radio buttons for 'Yes, I require Travel Allowance' and 'No, I do not require Travel Allowance'). A red arrow points from a mailbox icon to the comments text area. Another red arrow points from a fork and knife icon and a hotel icon to the 'Yes, I require Travel Allowance' radio button. A separate inset shows the 'Trip Purpose' dropdown menu with 'Clean Energy Center Hands-on Training' selected.

If you selected **“Yes, I require Travel Allowance”**, **build your itinerary** info (where/when you departed and arrived for each part of your travel). You will build at least two itinerary stops to reflect a round trip.

Two screenshots of the 'New Itinerary Stop' form. The first screenshot shows a departure from Philadelphia, Pennsylvania on 09/06/2023 at 6:00 AM and arrival in Harrisburg, Pennsylvania on 09/06/2023 at 8:30 AM. The second screenshot shows a departure from Harrisburg, Pennsylvania on 09/07/2023 at 5:00 PM and arrival in Philadelphia, Pennsylvania on 09/07/2023 at 8:00 PM.

Add all of your expenses: For each expense you have, click **Add Expense**, select the appropriate item, complete required fields, and attach the detailed receipt or completed *Declaration of Missing Receipt Form*.

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