PA WAP Continuing Education Reimbursement Guidelines
July 1, 2023 – June 30, 2024

Overview

The Clean Energy Center at 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 (NASCSP) 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 Professional, and the 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

*Note: BPI Home Energy Professional training courses and other <u>required</u> training (listed on Agency Training Plans) are <u>not</u> considered Continuing Education. See the ***PA WAP Clean Energy Center Hands-on Training Travel Reimbursement Guidelines*** for information on reimbursement for required in-person training.

Continuing Education - PA WAP Agency Budget Allocations

The Clean Energy Center manages the PA WAP's Continuing Education budget each program year, including an initial allocation for each Agency to use for direct-hire and subcontractor workers.

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

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 workers, 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, 2023 – January 31, 2024: Each Agency can approve CE pre-approval Requests up to their initial allocation. Agencies should strongly encourage direct-hire workers and subcontractors to submit pre-approval Requests into Concur by January 31st in order to encumber (reserve) CE funds.

February 1, 2024: Any CE funds that have not been *encumbered (approved)* 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, 2024: Last date for all workers/subcontractors to submit Requests in Concur to encumber funds.

April 1, 2024: 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 with PA DCED. **Wage reimbursement is <u>not</u> submitted to the Clean Energy Center or through Concur.** Contact PA DCED at RA-wxmail@pa.gov or your PA WAP Agency for guidance.

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 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.)

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

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 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, 2024**. **Reimbursement requests received after this date cannot be processed.**

Using Concur software to Requesting Pre-Approval (Prior to Attending Continuing Education)

Complete a Request in the **Concur** software with information regarding the Continuing Education event.

After logging into Concur, click the **+ Start a Request** button.
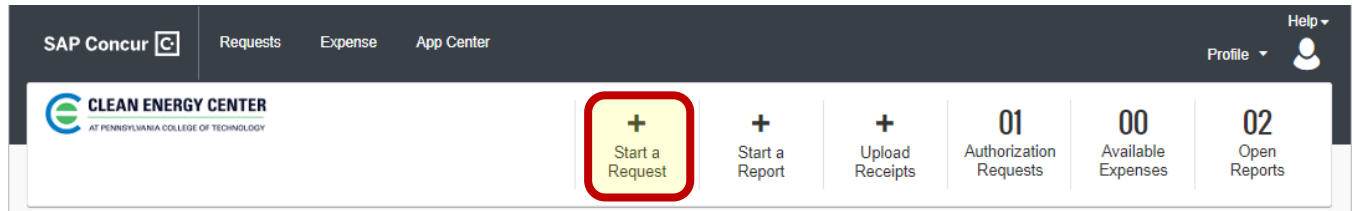
Complete all required fields.

For **WAP Agency Department**, select the PA WAP Agency that you work for (or if you are a subcontractor, the Agency that will approve your use of Continuing Education funds).

Add **all potential expenses** (expense types).

- Note: when it comes time to submit your reimbursement Expense Report, Concur will only allow you to ask for reimbursement for expense types built into your Pre-approval Request.

After submitting a Request, Concur will automatically route it to the approvers in the **Approval Flow**:


Individuals can **track the approval of a Request** in Concur by clicking on **Request Details**, then **Request Timeline**.
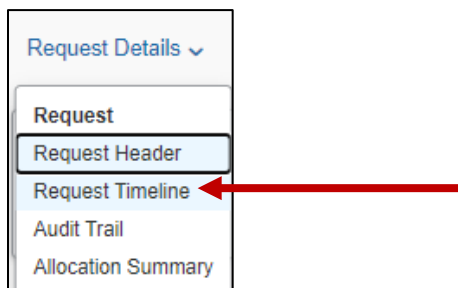
Reimbursement will only be issued after receiving DCED's approval and after expenses have been incurred (except the large expenses mentioned previously).

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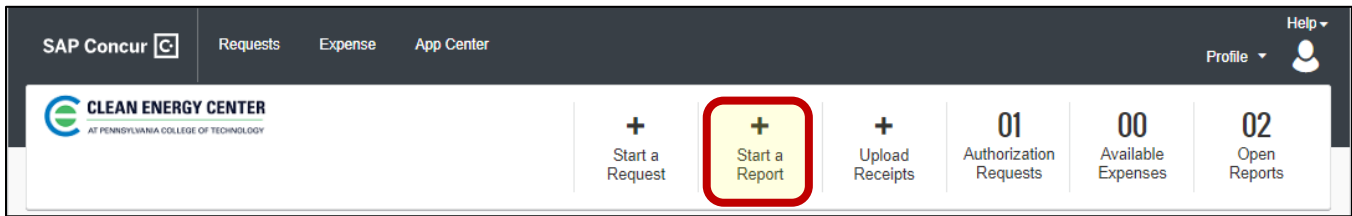
In the **Report Name**, type the name of the course.

For **Trip Purpose**, choose **Continuing Education**.

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"**

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.

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: providing 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.