

Checklist for Professional Development

Employee Travel

Before travel:

	Travel Authorization Form	See the policies and procedure for exceptions
	Out-of-State Essential Travel Authorization Form.	For all Out-of-State Travel. President's approval required
	Certificate of Exemption (Tax Exempt) Form	To prevent tax being charged to a purchase or acquisition
	Professional Development Application	If the expense will be charged to Professional Development funds.

After travel:

	Travel Expense Account Settlement Form (TES)	For all travel
	List of travelers	If Group Travel
	Mileage	No Documentation Required Mileage Rate X # of Miles From/To Destination via closest route
	Air	Reservation Information, Copy of Ticket and Itemized Receipt
	Vehicle Rental	Agreement, and Itemized Receipt
	Lodging	Portfolio or Agreement and Itemized Receipt
	Meals (Group Travel Only)	Itemized Receipt
	Meals (Personal)	Do Not Pay via P-Card. Travel Expense Settlement Form, and Itemized Receipt
	Gas	Itemized Receipt
	Registration/ Entry Fee	Registration Form and Itemized Receipt
	Food/ Non-Alcoholic Beverages	Itemized Receipt
	Brief Report	1000 Words, single spaced. (When, Where, and how it applies to position/duties/responsibilities at Glenville State University)

Student Travel (additional forms needed)

You must provide funding information for student's travel expenses along with your application

	Travel Authorization Form	See the policies and procedure for exceptions
	W9 for student	

Group Travel (additional forms needed)

	Travel Authorization Form for each person	See the policies and procedure for exceptions
	Individual meal receipts for each person	This includes if one person pays for someone else.

Coursework

	Requisition	See the policies and procedure for exceptions
	Beginning and ending date of the course	Note this information on your Professional Development Application
	Final Grade for the course	

Working Condition Educational Fringe Benefit - General Guide

Is the education needed to meet the minimum educational requirements of the position?	No – The educational reimbursement is <u>NOT</u> taxable. Yes - The educational reimbursement is taxable
Is the education part of a program of study that can qualify the employee for a new trade or business?	No – The educational reimbursement is <u>NOT</u> taxable. Yes - The educational reimbursement is taxable
Is the education required by the employer, or by law, to keep the present salary, status or job?	No – The educational reimbursement is taxable. Yes - The educational reimbursement is <u>NOT</u> taxable.
Does the education maintain or improve skills required in doing the present work?	No – The educational reimbursement is taxable. Yes - The educational reimbursement is <u>NOT</u> taxable.

*Note: Accumulative amount up to \$5250 can be exempt from tax status.



FACULTY APPLICATION FOR PROFESSIONAL DEVELOPMENT FUNDS

Name of Applicant: _____
Title of Applicant: _____
Category of Activity: _____

Dates of Activity/Course: _____
Department: _____

Description of Activity (Brief Description): (Attach meeting or event program, if applicable) (Char. Count 500)

Title of Meeting, Conference, or Event: _____
Location: _____

If presenting, please list title of paper, presentation or performance, and authors (Char. Count 500)

If serving as board member, society officer or organizer, please list function at meeting (Char. Count 500)

Explain how this activity fits into your overall faculty development plan: (Attach additional pages if necessary) (Char. Count 500)

Budget Breakdown: Please provide a breakdown of accurate and detailed cost information for each category, where applicable:

Airfare: _____ Lodging: _____ Registration fees: _____
Mileage: _____ Meals: _____ Other: _____
Total: \$ _____

If you are receiving funding from other sources for this activity/project, please specify source and amount.

Amount: _____ Source: _____

Less funding from other source: _____

Faculty awarded professional development funds must submit an abstract with a minimum of 250 words of activities and a Travel Expense Settlement within two weeks following the conclusion of the funded activity to Academic Affairs. **Food, drinks, and gratuity must be paid for out-of-pocket and cannot be charged to a state pcard. Refer to page 2 for proper documentation required. Though funding will be allocated for each time period, available funding will be limited. It will be up to the discretion of the Office of Academic Affairs to determine the amount awarded in response to each funding request up to the maximum allotted. Once the maximum funding is awarded, additional funding may not be available until the next academic year. **Reimbursement will be held until the abstract is presented to the Academic Affairs office.***

Signature of Applicant: _____ Department Chair Signature: _____ Date: _____

Approved Denied Amount Approved _____

Provost Signature: _____ Date: _____

HR Signature: _____ Date: _____

(for non-travel reimbursement)

CFO Signature: _____ Date: _____

(for non-travel reimbursement)