# Shepherd University

**Classified Employees Council**

**Staff Development Reimbursement Guidelines**

November 2017

(Revised)

The following steps are necessary to **apply** for Staff Development funds:

1. The applicant will complete and sign the Application for Staff Development Funds form and request the approval and signature of their Supervisor.
2. The applicant will forward the application with all attached supporting documentation to the Human Resources Office for verification of eligibility.
3. The Human Resources Office will verify, sign, and forward the application to the Chair of the Staff Development Committee.
4. The Chair will forward the application back to the applicant to submit to the Procurement Office.

Required steps for **reimbursement** of Training and Development expenses:

1. Personal Reimbursement—
   1. The Employee Reimbursement form and the attached original receipts showing expenses are required for reimbursement (be sure to include appropriate funding for staff development Fund 322043 Org 206035 Account: Employee Travel 7GH127; In-State 7GH157 - conference registration fees, books, tuition reimbursement; Out-of-State 7GH158 – conference registration fees, books, tuition reimbursement).
   2. Attach a copy of the approved application with the Employee Reimbursement Request form and forward to the Chair of the Staff Development Committee for approval.
   3. The employee soliciting funds will forward to the Procurement Office.
2. Payment by Purchasing Card—
   1. Attach receipt with current month’s visa log along with a copy of approved application for staff development.
   2. Include correct funding for staff development on purchasing card log sheet (Fund 322043, Org 20305, 7GH157 in-state or 7GH158 out-of-state) to ensure the expense is charged to correct budget.

Required steps for **reimbursement** of Travel expenses:

1. Personal Reimbursement—
   1. The Travel Authorization form should be submitted prior to traveling with the approved Staff Development Application attached.\*
   2. The Travel Settlement form should be completed with all of the original receipts attached.
   3. Include the correct funding on the Travel Settlement form to ensure the expense is charged to the appropriate budget ( Fund 322043 Org 206035 Account: Employee Travel 7GH127).
   4. Obtain the supervisor’s signature and forward to the Procurement Office for payment.
2. Payment by Purchasing Card—
   1. Attach receipt with current month’s visa log along with a copy of approved application for staff development.
   2. Include correct funding on purchasing card log sheet (Fund 322043 Org 206035) to ensure the expense is charged to correct budget.

\*If approved application was not received prior to traveling, attach to settlement noting funding change.