To: Montgomery College Community

From: Sophia L. Mason, Director, HRSTM Business Services
Office of Human Resources and Strategic Talent Management (HRSTM)

Subject: **FY24 Educational Assistance Program (EAP), EAP Travel, and Professional Development Assistance Program (PDAP) Updates and Reminders**

Date: March 6, 2024

The purpose of this memo is to provide annual updates on EAP, EAP Travel, and PDAP for FY24. The EAP and EAP Travel programs are for full-time faculty (FTF), non-bargaining and bargaining staff, department chairs, and administrators. PDAP is for part-time faculty (PTF) who have taught at least nine (9) ESH of credit courses over two (2) academic years.

Enhanced Guidance and New Resources

We continue to work and learn together and we appreciate everyone's patience with the EAP/PDAP process in Workday. We have improved the process by providing newly developed and updated training materials and guides, recorded videos, and FAQs, and updating the formatting of the website for easier navigation and access. [Please review the new resources on the EAP/PDAP page of the HRSTM website](). We remain consistent on following policies and procedures and collective bargaining agreements related to EAP and PDAP and have made the following enhancements and additions to our menu of materials and resources:

Updates to the Resource Guides	New Resources
• Separate EAP and PDAP guides • New section-based format with linked table of contents • Additional information about requirements for creating Suppliers for EAP • Enhanced general travel guidance for EAP and PDAP • Most Common Mistakes section	• Dedicated email for PDAP questions and requests: PDAPRequests@montgomerycollege.edu • Supplemental Supervisors Guide • Multiple EAP and PDAP Cheat Sheets, including How to submit by request type, Required documentation by request type, and others • EAP Travel Expense Report Cover Sheet Templates for FTF and Staff • PDAP Travel Expense Report Cover Sheet Template for PTF

Become an EAP/PDAP Expert

In addition, we are developing separate content and opportunities to train Administrative Aides, Executive Associates, other positions that provide unit/area administrative support, and any other employees that wish to become subject-matter experts about EAP/PDAP to learn to be an EAP/PDAP Expert. The goal is to have EAP/PDAP Experts in all areas of the College to ensure employees have the support and guidance they need to successfully engage with the EAP/PDAP process. Please stay tuned for additional information under separate cover. If you are interested in becoming an EAP/PDAP Expert for your team, please email EAPRequests@montgomerycollege.edu or PDAPRequests@montgomerycollege.edu.

EAP vs. PDAP

Additional materials have been created to assist supervisors with understanding the difference between EAP and PDAP so they can sufficiently support all of their employees. Note that PDAP can be used for the same items and related travel that are covered under EAP and EAP Travel, plus MC credit courses which are covered by Tuition Waiver for benefits-eligible employees, as PTF are not eligible for Tuition Waiver. In addition to eligibility, PDAP differs from EAP in that there is a single allocation per eligible PTF, whereas EAP and EAP travel are two (2) separate allocations, and in how requests can be processed, as noted here:

	EAP	**PDAP**
Eligibility	After 6 months of employment; full-time faculty, administrators, and staff, full-time temporary staff with benefits, and part-time staff on a pro-rated basis	Part-time faculty who have taught at least nine (9) ESH of credit courses over two (2) academic years (eligibility begins the next semester after teaching the 9-ESH requirement)
Fund Allocation and Payment Options	Allocation for eligible EAP and wellness expenses each fiscal year, up to FY maximum (direct pay or reimbursement; wellness is reimbursement only)	Single allocation for eligible PDAP expenses, including MC credit and non-credit courses, wellness, AND eligible PDAP Travel expenses each fiscal year, up to FY maximum (reimbursement only)
	Additional allocation for eligible EAP Travel expenses each fiscal year, up to FY maximum (reimbursement only)	
MC Credit Courses	EAP is not applicable; covered under Tuition Waiver and EAP criteria does not apply	Eligible expense for PDAP and PDAP criteria applies (i.e., job-related)

Tax Implications

We want to remind employees about the tax liability for all tuition benefits above the IRS limit of $5,250 and for all wellness reimbursement requests each calendar year. Targeted email communications confirming these tax liabilities will be sent to affected employees, but general information about tax implications is always available on the EAP/PDAP page of the HRSTM website. Participation in these programs is an acknowledgement of applicable tax liability.

Acknowledgement Forms

A signed acknowledgement form has been required for ALL EAP, EAP Travel, and PDAP requests since January 2023, and will continue to be enforced. Only Wellness reimbursements do not require an acknowledgement form. This acknowledgement form will allow employees to enter and confirm key required information for processing the request in Workday. It also references the applicable College policy and procedures that regulate EAP and PDAP and requires acknowledgement that the employee understands that they must refund the College in the event of failing a course, withdrawing from a course, not completing and/or not attending a class, course, conference, webinar, seminar, or event paid for with EAP/PDAP funds. Last, this form confirms the tax liability the employee owes for applicable benefits. Requests processed in Workday without the acknowledgement form will be sent back to the employee to be updated, which will delay processing. There may be other errors that require attention, so please read the comments carefully for the best result.

Comments

Please pay close attention to the comments if your request is sent back to you for more information. This is not a denial; we simply need more information, so please read the comments carefully for specific instructions for how to complete your request successfully. We will make every effort to collect missing information and ask questions if any information provided is unclear or does not appear to meet basic EAP/PDAP criteria before denying any request. As supervisors are responsible for reviewing and approving all EAP/PDAP requests before they come to HR, we will ask supervisors about any questionable requests that do not appear to meet basic EAP/PDAP criteria.

Complete Submissions and Proof of Completion

All requests must be complete and accurate before being approved by the appropriate supervisor, including an acceptable justification for each request and all applicable supporting documentation, which are both required for processing. EAP/PDAP requests should be related to an employee's current job, prepare employees for higher-level work and/or another career at the College, or related to a job-related degree program. Requests will be processed in the order they are received. **If you have reserved travel funds using a Spend Authorization but are no longer planning to go on your trip, please cancel your request in the Workday system and contact us as soon as possible so that we may release the funds for use by others.**

As a reminder, employees using EAP/PDAP funds for degree-seeking programs must provide proof of completion of the course and a satisfactory grade. Employees must also show proof of completion for any EAP/PDAP event attended. If the course, seminar, conference, or workshop is dropped or not attended, or if the employee receives a failing grade, the employee is responsible for reimbursing the College ([P&P 35001C, XIX, A, 5, b](#)). Upon completion of any EAP/PDAP-covered expense, please email applicable documentation to EAPRequests@montgomerycollege.edu or PDAPRequests@montgomerycollege.edu.

Reserving Funds

We will continue to keep the college community informed of the status of EAP, EAP Travel, and PDAP fund availability. We understand that some employees attend classes, conferences, etc. at the end of the fiscal year when funds may no longer be available. In an effort to be fair and equitable, funds may be reserved now for classes and various activities occurring during the applicable fiscal year by submitting a requisition (for direct payments) or spend authorization (for reimbursements) in Workday. Funds can no longer be reserved for future fiscal years. Please remember that all travel requires pre-approval PRIOR to travel. Remember, all EAP Travel, all Wellness, and all PDAP requests are always reimbursement only.

Utilization Rates

The breakdown of EAP, EAP Travel, and PDAP utilization by employee constituency is located on the [EAP/PDAP page of the HRSTM website](). Check back often to track how quickly EAP/PDAP benefits are being used for your applicable employee group. Remember, once the total budgeted amount for the current fiscal year has been used, no additional EAP/PDAP requests can be processed until the next fiscal year.

Contact Us

If you have any questions, please contact [EAPRequests@montgomerycollege.edu]() or [PDAPRequests@montgomerycollege.edu](). Thank you for your continued commitment to learning the system to ensure maximum participation in these professional development programs.