EAP CHEAT SHEET

REQUIRED DOCUMENTATION FOR CONFERENCES AND MEMBERSHIPS

EAP Request Type	Processing Method	Required Documentation (All files must be converted to PDF)	Proof of Completion and/or Satisfactory Grade Required (Email to EAP Requests)	Ineligible Expenses
Conferences/Seminars/ Webinars/Workshops (**DO NOT** combine the cost of your conference registration with your EAP Travel request. They must be submitted separately.)	**Workday** • **Direct Payment**: Create Supplier Invoice Request • **Reimbursement**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Unpaid invoice (direct pay) OR payment receipt (reimbursement) which includes the employee's name • Start and end dates of event	Documentation of completion – e.g., photo of badge, email confirmation noting attendance, email with applicable professional credits for attending, etc.	• Suggested and/or optional books NOT required for the event
Professional Association Memberships	**Workday** • **Direct Payment**: Create Supplier Invoice Request • **Reimbursement**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Unpaid invoice (direct pay) OR payment receipt (reimbursement) which includes the employee's name • Expiration date of the new/renewed membership	N/A	• Shipping and handling costs • Fees for printed certificates or other memorabilia related to the certification or recertification

JUMP TO ►
- Undergraduate and Graduate Tuition
- Professional Publications/Magazines
- Travel
- MC Courses, Fees, and Books
- Licensures and Certifications
- Wellness

EAP CHEAT SHEET

REQUIRED DOCUMENTATION FOR NON-MC TUITION & MC COURSES

EAP Request Type	Processing Method	Required Documentation (All files must be converted to PDF)	Proof of Completion and/or Satisfactory Grade Required (Email to EAP Requests)	Ineligible Expenses
(Non-MC) Undergraduate and Graduate Tuition Including: • Mandatory Tuition Fees • Required Books	**Workday** • **Direct Payment**: Create Supplier Invoice Request • **Reimbursement**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Unpaid invoice (direct pay) OR payment receipt (reimbursement) which includes the employee's name • Start and end dates of courses • (If applicable) Receipt for paid books and the course syllabus (must state book requirement)	Satisfactory Final Grade(s) – passing grade for the applicable undergraduate or graduate credit course(s)	• Admission/Application fees, late fees, parking fees, graduation fees, payment plan fees, and any charges not related to the cost of a particular course • Suggested and/or optional books NOT required for the course • Shipping and handling costs
MC Courses, Fees, and Books	Email a completed **EAP Request Form for MC Courses, Fees, and Books** to **EAP Requests**	• (If applicable) Annual EAP Acknowledgement Form • Completed EAP MC Courses, Fees, and Books Form • Acceptable justification • (If applicable) Receipt for paid books and the course syllabus (must state book requirement)	Satisfactory Final Grade(s) – passing grade for the applicable non-credit or credit course(s)	• Suggested and/or optional books NOT required for the course • Shipping and handling costs

EAP CHEAT SHEET

REQUIRED DOCUMENTATION FOR PUBLICATIONS AND LICENSES/CERTIFICATIONS

EAP Request Type	Processing Method	Required Documentation (All files must be converted to PDF)	Proof of Completion and/or Satisfactory Grade Required (Email to EAP Requests)	Ineligible Expenses
Professional Publication/Magazine Subscriptions	**Workday** • **Direct Payment**: Create Supplier Invoice Request • **Reimbursement**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Unpaid invoice (direct pay) OR payment receipt (reimbursement) which includes the employee's name • Expiration date of the new/renewed publication or subscription	N/A	• Shipping and handling costs • Publications/magazines that are not EAP eligible based on content or professional affiliation
Licensures and Certification Fees	**Workday** • **Direct Payment**: Create Supplier Invoice Request • **Reimbursement**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Unpaid invoice (direct pay) OR payment receipt (reimbursement) which includes the employee's name • Expiration date of the new/renewed license or certification	(If applicable) Certificate of completion	• Shipping and handling costs • Fees for printed certificates or other memorabilia related to the certification or recertification

EAP CHEAT SHEET

REQUIRED DOCUMENTATION FOR TRAVEL

EAP Request Type	Processing Method	Required Documentation (All files must be converted to PDF)	Proof of Completion and/or Satisfactory Grade Required (Email to EAP Requests)	Ineligible Expenses
Travel (**IMPORTANT**: EAP Travel Spend Authorizations must be submitted PRIOR to travel.) (**DO NOT** combine the cost of your conference registration with your EAP Travel request. They must be submitted separately.)	**Workday Reimbursement Only**: • **PRIOR** to event: Create Spend Authorization • **AFTER** event: Create Expense Report	**PRIOR** to event: • (If applicable) Annual EAP Acknowledgement Form • Acceptable justification • Start and end dates of travel • Conference/event registration to serve as confirmation of attendance (not required if you already submitted an EAP request for the registration) **AFTER** event: • Detailed receipts for travel expenses (i.e., airfare, lodging, meals, car rental, etc.) • For personal car mileage: Screenshot from Google Maps or MapQuest stating the to-and-from destinations, including the total miles driven	Documentation of completion – e.g., photo of badge, email confirmation noting attendance, email with applicable professional credits for attending, etc.	**General:** • Expenses for anyone other than the employee • Souvenirs, toiletries, clothing, office stationery, etc. **Transportation:** • Seating/boarding upgrades, early check in, premium seating, etc. • Travel insurance • Fees from third-party booking services (Globetrotter, CheapOAir, etc.) **Meals:** • Alcoholic beverages • Room service fees (separate from gratuity)

EAP CHEAT SHEET

REQUIRED DOCUMENTATION FOR WELLNESS

EAP Request Type	Processing Method	Required Documentation (All files must be converted to PDF)	Proof of Completion and/or Satisfactory Grade Required (Email to EAP Requests)	Ineligible Expenses
Wellness* (View additional notes below)	**Workday** • **Reimbursement Only**: Create Expense Report	• (If applicable) Annual EAP Acknowledgement Form • (If applicable) Documentation of attendance or participation for a gym membership requires proof of use of the facility eight (8) times per month or 75% participation of a program with packages. • (If applicable) An Annual Preventive Wellness Allowance Form. This type of request may only be processed **ONCE** per fiscal year in a single reimbursement request. • Receipt(s) of payment	Proof of Completion – e.g., attendance report from the facility, screenshots from the app showing attendance, etc.	1. Unapproved memberships/facilities 2. Expenses for months that the attendance requirement was not met **Email Megan Cooperman to confirm whether your gym membership or fitness activity is eligible for EAP.**

***All wellness reimbursements are considered taxable income in the calendar year.**

All taxable requests will be captured through quarterly reporting and processed on the two (2) pay dates immediately following the quarterly report. **Visit the EAP/PDAP webpage for additional details and deadlines for tax-liable requests.**

Additional Resources

Email **EAP Requests** if you have any questions before you submit your EAP request(s) in Workday.

Visit the **EAP/PDAP webpage** for more information about EAP, including more helpful Cheat Sheets, demo videos, and the EAP Resource Guide.