MONTGOMERY COLLEGE

Memorandum

To: Montgomery College Community

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

Subject: **FY25 Educational Assistance Program (EAP), EAP Travel, and Professional Development Assistance Program (PDAP) Updates and Reminders**

Date: December 11, 2024

The purpose of this memo is to provide annual updates on EAP, EAP Travel, and PDAP for FY25. 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.

Enhancements beginning January 2025
We appreciate the feedback and requests for an easier way to access EAP/PDAP benefits. We are pleased to announce changes to simplify the EAP and PDAP request process, which will begin when we return from winter break.

- **Streamlined One-Step Process**: Effective January 6, 2025, direct payment requests and non-travel reimbursement requests will require **just one step**. Direct payments will no longer require a 2-step process of a Requisition and a Receipt, and will transition to use of a Supplier Invoice Request only. Non-travel reimbursements will no longer require a 2-step process of a Spend Authorization and an Expense Report, and will transition to an Expense Report only. Approved EAP and PDAP Travel will still require a Spend Authorization in advance of the travel before an Expense Report can be processed. **No new Requisitions or non-travel Spend Authorizations should be submitted in Workday after Monday, December 16.**

- **Annual Acknowledgement Form**: Beginning January 6, 2025, acknowledgement forms will be required **once per fiscal year** instead of per EAP/PDAP request. This form ensures that employees understand key aspects of the College policy and procedures that govern EAP/PDAP, including consequences when the event is not attended or completed satisfactorily, and also confirms the tax liability the employee owes for applicable benefits. Existing acknowledgement forms submitted since July 1, 2024 will satisfy the requirement for any new requests through June 30, 2025.

Updated Guidance and Resources

We continue to work and learn together and we appreciate everyone's patience with the EAP/PDAP process in Workday. [Please review the new resources on the EAP/PDAP page of the HRSTM website](). You will find new job aids for the updated process on the EAP/PDAP page. Demo videos are in development and will be available in January.

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.

Comments

Please pay close attention to the comments if your request is sent back to you for more information. This is not an automatic denial of the request; 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 spend authorization (for reimbursements) in Workday. Now that direct payments will require only one step, a supplier invoice request (for direct payments) will trigger payment as soon as it is processed. 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](#) and typically updated on a quarterly basis. 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.