MONTGOMERY COLLEGE

# FY27 PDAP RESOURCE GUIDE

## Your Guide for Essential Information on PDAP, Workday Processes, and Available Support Resources

**Office Of Human Resources And Strategic Talent Management**

**Revised July 2026**

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# PLAN, PREPARE, AND PROCESS
# THE 3 PS

**To help guide employees' learning and ability to correctly access PDAP benefits, we encourage everyone to use the Plan, Prepare, Process Framework:**

| PLAN | PREPARE | PROCESS |
| --- | --- | --- |
| LEARN ABOUT PDAP | COLLECT YOUR DOCUMENTATION | SUBMIT YOUR PDAP REQUEST |

MC

# STEP 1: PLAN
## LEARN ABOUT PDAP

- Confirm your PDAP eligibility.
- Learn about the program's benefits and rules.
- Understand the difference between entitlement and eligibility.
- Discuss your professional development goals with your supervisor and how PDAP can support your growth.
- Engage with resources, guides, and videos to learn the process to request funds.

# PDAP DEFINED

- The Professional Development Education Assistance Program (PDAP) offers financial assistance for a variety of professional development activities, programs, and services for bargaining part-time faculty.

- Eligible activities must fulfill one or more of the following criteria:
  1. Improve job-related knowledge and skills to perform more effectively in a current position;
  2. Aid in the pursuit of a job-related degree or professional certification; and/or
  3. Prepare for advancement to a different or higher-level position within the College.



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# PDAP ELIGIBILITY

## Who Is Eligible?

- Instructional part-time faculty employees must be in the Service Employees International Union (SEIU) to participate in PDAP benefits.
  - SEIU Eligibility: Part-time faculty are required to have taught **at least nine (9) instructional ESH over the course of the prior two (2) academic years**.

## Who Is Ineligible?

- Non-bargaining part-time faculty, PDAP-eligible employees (i.e., full-time faculty, bargaining staff, and non-bargaining staff), casual temps, and student workers
- PDAP eligibility ends once you transfer to an EAP-eligible, primary position

To verify if you meet the SEIU eligibility requirements, contact the **Human Resources Employee Engagement and Labor Relations (EELR) Team** at EmployeeRelations@montgomerycollege.edu.

# PDAP REQUEST TYPES

## Reimbursements

### Non-Travel, Travel, and Wellness

**Workday Processes:** Create Spend Authorization **and/or** Create Expense Report

Employees can be reimbursed for expenses incurred.

- All expenses **REQUIRE** proof of payment to be eligible for reimbursement.
- PDAP Travel requests are **reimbursement only** and are required to be submitted as a Spend Authorization PRIOR to the PDAP travel, followed by an Expense Report.

# FY27 PDAP ALLOCATIONS

To view the current fiscal year allocation utilization, visit the [HRSTM PDAP/PDAP Webpage](), click on **PDAP Training, Resources, and Key Information**, and click **FY27 PDAP Allocations**.

There is one limit for all PDAP eligible employees per fiscal year. This limit may be used for eligible travel and non-travel requests.

| | Part-time Faculty |
|---|---|
| PDAP Per Employee (Max) | $1,250 |
| Overall PDAP Budget (Max) | $54,000 |

**PDAP Wellness Monthly Maximum: $50**

PDAP Wellness is not a separate benefit, and expenses are utilized from the per employee max.
**All wellness reimbursements and incentives are considered taxable income.**

# ELIGIBLE PDAP EXPENSES

- **Non-Travel**:
  - Conference Registration
  - Professional Memberships (Limit: Two per Fiscal Year)
  - Licensures
  - Workshops
  - Professional Publications/Journals/Magazines
- **MC Courses and Non-MC Tuition**:
  - MC Credit and Non-Credit Courses and Fees
  - Non-MC Undergraduate and Graduate Course Tuition and Mandatory Fees
  - Required textbooks listed on the syllabus
- **Travel (Local, Domestic, and/or International* Travel)**:
  - Airfare, Ground Transportation, and Parking
  - Lodging
  - Meals and Gratuity
  - Personal Car Mileage
  - Car Rentals and Rental Gas Receipts

  ***International Travel requires SVP approval***
- **Wellness**:
  - MC Sponsored Wellness Programs
  - Outside Gym Memberships or Subscriptions (i.e., Yoga/Barre/ Pilates Studios, Orange Theory, F45, Peloton, Rock Climbing Centers, WW, Noom, etc.

  ***Contact the HR Employee Wellness Specialist to inquire about wellness-related activities not listed.***

# INELIGIBLE PDAP EXPENSES

- **General (All Request Types)**:
  - Expenses for recreational, hobby, or personal business endeavors such as art-related activities or workshops, unless specifically job-related and is Manager approved
  - Computer/IT equipment or work tools (such as Grammarly or AI applications) (see your Department for technology needs)
  - PDAP expenses for an ineligible employee (see your Department in these cases regarding general training/professional development funds)
  - Late payment fees
  - Maryland taxes on eligible expenses
  - Any eligible PDAP expense for a service that was not completed or completed with an unsatisfactory grade
- **Tuition**:
  - Admission/Admission fees, parking fees, graduation fees, and any charges not related to the cost of a particular course
  - Optional or recommended books for courses and/or conferences, etc.
  - Certain shipping and handling costs
- **Travel**:
  - Expenses aside from your own (other members of your party, colleagues, or friends)
  - Ancillaries/Enhancements such as priority boarding/seating, airport lounge access, travel/trip protection, in-flight services, etc.
  - Gas receipts for personal cars and/or mileage for car rentals



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# PDAP FOR MC COURSES, BOOKS, AND FEES

- MC course fees, required books, and non-credit continuing education (WDCE) courses may be covered under PDAP for eligible employees. Part-time faculty are not eligible for Tuition Waiver (employees or dependents).
- PDAP funds cannot be used for dependents and spouses.
- Employees are required to provide a justification for taking the course and follow the guidelines for all PDAP requests submitted in Workday.



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# PDAP TRAVEL

- PDAP follows the **College PandP 65001 Reimbursement for Travel and Related Expenses** for PDAP travel requests. Travel expenses related to an approved PDAP event should **only** be submitted as a PDAP travel reimbursement request (even if local).
- PDAP Travel funds cannot be used for daily work commutes. Eligible campus-to-campus mileage may be reimbursed using department funds. Contact your supervisor/manager for further questions.
- MC does not currently have a per diem (i.e., daily allowance for meal expenses when on approved travel). Employees may be reimbursed for the reasonable costs of meals while traveling on official College business.

**NOTE**: Refer to the PDAP Required Documentation and Travel Guidance Cheat Sheets for further details regarding eligible and ineligible expenses related to travel.

# PDAP INTERNATIONAL TRAVEL

- PDAP funds may be utilized for opportunities to study and enhance your professional development abroad.
- In addition to standard supervisor approval, **all international PDAP and travel requests must be approved by the employee's Senior Vice President (SVP) in advance**. This approval should be in writing and attached to the documentation for your PDAP request.
- International travel imposes the potential for additional fees, however the same PDAP per employee limits and guidelines apply.
- All international PDAP requests are processed in the United States Dollar (USD). Make sure you use your **U.S.-issued credit cards** because the daily exchange rate will automatically be calculated for you on the card statement. DO NOT use cash.

**NOTE**: Refer to the PDAP Required Documentation and Travel Guidance Cheat Sheets for further details regarding eligible and ineligible expenses related to travel.



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# PDAP WELLNESS AND TAX IMPLICATIONS

- PDAP benefits may be used for eligible wellness expenses up to the allowed limit per month, within the current fiscal year.
- At least eight (8) days out of the month or 75% of a program with limited duration must be provided to HR.
- PDAP wellness funds cannot be used for dependents and spouses.
- **All wellness reimbursements and incentives are considered taxable income.**
  - Taxable wellness reimbursement and incentives will be captured through quarterly reporting and processed once per quarter on the pay date immediately following the quarterly report – April, July, October, and December*.

*PDAP wellness reimbursement requests **must be submitted by December 15** to allow employees to cover any applicable tax liability through payroll deduction by December 31. Wellness requests submitted on or after December 15 will be processed in the following calendar year and included in the next quarterly taxable reporting.

# FY27 DATES AND DEADLINES

- Office of Business Services (OBS) will announce the deadlines for final EAP/PDAP requests, typically by April.
- HRSTM will send reminders about the designated deadlines for all EAP/PDAP requests via multiple channels (HRSTM newsletter, email blasts, etc.). **Please make note of applicable deadlines when announced.**

| | |
|---|---|
| **July 1, 2026** | Start of the Fiscal Year (**FY27**) |
| **September 2026** | FY27 EAP/PDAP Utilization Updated Online |
| **December 2026** | FY27 EAP/PDAP Utilization Updated Online |
| **March 30, 2027** | *Employee Matters* Communication – Last 90 Days |
| **March 2027** | FY27 EAP/PDAP Utilization Updated Online |
| **April 30, 2027** | *Employee Matters* and Email Communication – Last 60 Days |
| **May 30, 2027** | *Employee Matters* and Email Communication – Last 30 Days |
| **June 5, 2027** | Deadline for EAP Non-Travel Direct Payment Approvals |
| **June 22, 2027** | Deadline for EAP/PDAP Non-Travel Reimbursement Submissions |
| **June 30, 2027** | Deadline for EAP/PDAP Wellness Submissions & End of the Fiscal Year (**FY27**) |
| **July 1, 2027** | Start of the Fiscal Year (**FY28**) |

# FY27 DATES AND DEADLINES

## APPROVING REQUESTS BETWEEN FISCAL YEARS

- PDAP requests are approved depending on the end date of the activity and in which fiscal year (FY) this occurs in. **The end date MUST fall within the current FY to be considered for approval.**
- Conferences that are evenly split between two fiscal years by a few days can be approved in either fiscal year (e.g., a conference taking place June 29 through July 2).
- Activities that occur outside of **FY27** will not be considered for approval (i.e., an activity that ended prior to the start of the current fiscal year is no longer eligible, and an activity that begins or concludes after the fiscal year-end must be submitted on or after July 1).
  - **IMPORTANT**: Professional memberships and licensures are not included in this guideline as they typically last longer than one year.
- An annual professional membership that spans two (2) fiscal years can be reimbursed in either fiscal years. If PDAP funds have already paid for a membership in the current fiscal year, you cannot use PDAP funds for a renewal within the same fiscal year.

# STEP 2: PREPARE

## COLLECT YOUR DOCUMENTATION

- Register for webinars and conferences, enroll in courses, sign up for memberships, etc. That contribute to your professional development.
- Collect and organize your invoices and/or receipts.
- Complete your annual PDAP acknowledgement form(s) (required once per fiscal year) and/or travel cover sheet(s) (optional).
- Review resources to make sure you know how to correctly process your request(s), including approximately how long it will take to process the payment and determining if a supplier is in the system.

# PDAP GUIDANCE

## WHAT DO I NEED TO SUBMIT A REQUEST?

HRSTM will always look for the four following items on every request:

1. (If applicable) A completed and signed **PDAP Acknowledgment Form**.
   - Required once per fiscal year
2. Documentation or a screenshot of a **bill or payment**.
   - Itemized and paid receipt
3. Documentation or a screenshot of the **activity start and end dates**.
4. A **justification** explaining how the PDAP activity is impactful to your professional development in your position at MC.
   - Required for every PDAP request that is submitted, except for Wellness requests

**Case-By-Base Scenarios:**

- If you are submitting an international request, **written approval from your SVP** is required.
- If you are submitting a request for course books, **a syllabus showing the book requirement** must be attached.

# PDAP GUIDANCE

## WHAT DO I NEED TO BE REIMBURSED FOR A NON-TRAVEL REQUEST?

### Non-Travel – Reimbursement (Expense Report)

**Required Information/Documentation:**

- An annual PDAP Acknowledgement Form is required to be submitted with an employee's first request of the fiscal year.
- An **ITEMIZED** and **PAID receipt** of the item.
- Documentation of the **start and end dates** of the activity.
- A **justification** for participation in the activity that explains how it meets PDAP criteria.
- For **international travel requests**: All international requests must include **advanced written approval from the employee's Senior Vice President (SVP)**.

# PDAP GUIDANCE

## WHAT DO I NEED TO BE REIMBURSED FOR A TRAVEL REQUEST?

### Travel – Reimbursement (Spend Authorization)

**Required Information/Documentation:**

- An annual PDAP Acknowledgement Form is required to be submitted with an employee's first request of the FY.
- Documentation of the **start and end dates** of the activity.
- A **justification** for that explains how it meets PDAP criteria.
- For **international travel requests**: All international requests must include **advanced written approval from the employee's Senior Vice President**.
- **(Optional) ITEMIZED** receipt(s) documenting payment date and cost for each item (if multiple).

### Travel – Reimbursement (Expense Report)

**Required Information/Documentation:**

- **ITEMIZED** and **PAID receipt(s)** documenting payment date and cost for each item (if multiple).
- A **badge or nametag** from the event that displays the employee's name and the name of the event.
- If a badge or nametag was not provided at the event, please provide alternative documentation to prove attendance (e.g., a picture you had taken at the conference, an email confirmation of attendance, etc.).

# PDAP GUIDANCE

## WHAT DO I NEED TO BE REIMBURSED FOR A WELLNESS REQUEST?

### Wellness – Reimbursement (Expense Report)

**Required Information/Documentation:**

- An annual PDAP Acknowledgement Form is required to be submitted with an employee's first request of the fiscal year.
- An **ITEMIZED** and **PAID receipt(s)** of the wellness activity for each month. You can submit multiple months at once but must have the required backup for each month.
- **Documentation of attendance or participation**.
  - Gym memberships require documentation of your fitness center check-in history. At least eight (8) days out of the month or 75% of a program with limited duration must be provided.

# PDAP GUIDANCE

## WHAT DO I NEED TO SUBMIT AN PDAP REQUEST FORM MC COURSES, BOOKS, AND FEES?

### PDAP Request Form MC Courses, Books, and Fees

**Required Action:**

1. **Registration** for credit courses must be completed prior to submitting a form.
2. Follow the link and fully complete an PDAP Request Form for MC Courses, Books, and Fees.
   - A **justification** is required.
   - **Supervisor signature** is required.
   - Receipts **MUST** be provided for textbooks. PDAP funds will be applied to the employee's MC student account regardless of whether or not they have paid for books prior to submitting a form.
3. Email the completed form to PDAP Requests.

**IMPORTANT**: PDAP requests for MC-related courses are not processed via Workday.

# STEP 3: PROCESS
## SUBMIT YOUR PDAP REQUEST

- Determine how you will process your request(s) based on what you are doing and whether you wish to have the College pay the Supplier directly on your behalf, or pay personally and be reimbursed.
- Check the status of your submitted request. Your request will be delayed if insufficient documentation or information are provided and/or the request is awaiting action. If your request is sent back please read the comments carefully and ensure you respond to all required actions to keep the process moving forward.

# WORKDAY PDAP WORKFLOW

## REIMBURSEMENT ORDER OF PROCESS

| I already paid or will pay for my eligible PDAP non-travel or Wellness expenses and **I need MC to reimburse me.** ↓ | I already paid or will pay for my eligible PDAP travel expenses and **I need MC to reimburse me.** ↓ |
| --- | --- |
| **Step 1: Create Expense Report**<br><br>(Non-Travel: Job Aid (Pg. 2) \| Demo Video)<br>(Wellness: Job Aid \| Demo Video) | **Step 1: Create Spend Authorization**<br>(Job Aid (Pg. 4) \| Demo Video (Stop @13:30))<br>↓<br>**Step 2: Once the Spend Authorization is APPROVED, Create Expense Report after returning from travel**<br>(Job Aid (Pg. 6) \| Demo Video (Start @13:31)) |

***View My Expense Reports*** to confirm approval or payment status.
PDAP reimbursements are processed according to your Payment Elections,
and are separate from and not included with your payroll deposit.

Payments are processed weekly upon final approval by the Manager, the PDAP Partner (HRSTM), **AND** Accounts Payable.
If approved by Wednesday, the payment will be included in Thursday check run for Friday disbursement.

Contact **Accounts Payable** for questions related to the payment (*i.e.*, payment reconciliation status).

# PDAP TIPS AND ADVICE

## KEY DATA FIELDS

- **CAREFULLY REVIEW EACH FIELD** to ensure the information is correct prior to submission. The system will automatically default to your department's budget and **this must be corrected to reflect the PDAP budget**.
  - The following **Business Purpose MUST** be used for all PDAP requests:

**PDAP Non-MC Courses, Seminars, Conferences, Workshops, Memberships & PDAP Travel**

  - The following **Cost Center**, **Fund**, and **Program MUST** be entered for all PDAP requests:

**Cost Center – MC0001 | Fund – 1000 | Program – 7000**

  - The following **Expense Item MUST** be entered for all PDAP requests:

**PDAP – Part Time Faculty Prof Development**

- **DO NOT BACKDATE A REQUEST.** Late submissions from the previous fiscal year are not guaranteed to be considered for approval in the current fiscal year. **We cannot backdate to a closed fiscal year.**



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# PDAP TIPS AND ADVICE

## KEY DATA FIELDS

| | Non-Travel | Travel | Wellness |
|---|---|---|---|
| **Expense Item** (Spend Authorizations & Expense Reports) | PDAP - Part Time Faculty Prof Development | PDAP - Part Time Faculty Prof Development | PDAP - Part Time Faculty Prof Development |
| **Cost Center** | **MC0001 College Wide Operations – Benefits/Payroll Payment** | | |
| **Fund** | **FUND_1110 Operating Fund** | | |
| **Program** | **PROGRAM_7000 Institutional Support** | | |
| **Additional Worktags** | **HR will enter the Activity** | | Activity: W Wellness ACTIVITY_W |

# PDAP TIPS AND ADVICE

## TRAVEL REQUESTS

- Remember to request an **itemized receipt for all expenses** you would like to be reimbursed for. This includes meals, transportation (e.g. ride sharing and rental cars), lodging, or any other eligible travel expense.
- **Travel expenses for anyone other than the employee are not eligible for reimbursement**. If you traveled with a group, highlight your meals and lodging expenses on the copy of receipts for the PDAP Team to quickly determine your expenses.
- **Alcoholic beverages and non-meal items** (e.g. souvenirs) **are not eligible for reimbursement**.
- **Select the most cost-efficient and effective forms of travel.** Significantly higher travel expenses for the purpose of accommodating additional travelers or coordinating a personal trip are not acceptable (e.g., driving versus flying, or flying to/from a different city than the location of the PDAP event).
  - **NOTE: Accommodations for disabilities may be eligible for reimbursement.**
- For international travel, **make sure to use your US-issued credit cards**. The daily exchange rate will be calculated for you automatically on your bank statement. **DO NOT USE CASH.**

# PDAP TIPS AND ADVICE

## JUSTIFICATION

- Employees are required to write a justification for their PDAP Expenses, which should be no more than a few sentences. Your request will be sent back if your justification is insufficient and does not reflect one or more of the following criteria:
    1. Improve job-related knowledge and skills to perform more effectively in a current position;
    2. Aid in the pursuit of a job-related degree or professional certification; and/or
    3. Prepare for advancement to a different or higher-level position within the College.

| Examples of Sufficient Justifications | Examples of Insufficient Justifications |
|---|---|
| • This course is required for my degree program, which is related to my current/prospective job at the College.<br>• [Event] will provide updates/new insights for my current/prospective job duties at the College and assist me in fulfilling these duties.<br>• [Event] is critical for keeping me up to date on changes, new trends, and compliance standards in my area/field. | • Professional development<br>• Listing the name of the event with no further context<br>• I enjoy learning about XYZ…<br>• My manager approved…<br>• XYZ looks interesting… |

# RESOURCES

## PDAP GUIDES

| Links to the Job Aids |
| --- |
| **Submitting a Reimbursement Request** |
| • Create a Spend Authorization and/or an Expense Report<br>• Create a Wellness Expense Report |

| Links to the Demo Videos |
| --- |
| **Submitting a Reimbursement Request** |
| • Create a Non-Travel Expense Report<br>• Create a Travel Spend Authorization and a Travel Expense Report<br>• Create a Wellness Expense Report |

# RESOURCES

## HRSTM PDAP Webpage General Info, Forms, and Cheat Sheets

### HRSTM PDAP Webpage

- General PDAP Info and PDAP FAQs
- Current FY Allocation and Utilization Data
- Annual PDAP Acknowledgment Form
- PDAP Affidavit Form for Course Completion
- PDAP Travel Cover Sheet (Excel)
- PDAP Request Form for MC Courses, Books, and Fees

### MC Wellness (PDAP Wellness Reimbursement)

**Cheat Sheets**

- Required Documentation
- Where do I Submit my PDAP?
- Most Common Mistakes
- Tech Tips
- Travel Guidance



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# RESOURCES

## PDAP/PDAP ZOOM OFFICE HOURS

Our dedicated HR Help Desk Team will be available to address your concerns and provide personalized guidance. This is your chance to dive deeper into any lingering questions or concerns you may have **after** exploring the extensive **HRSTM PDAP/PDAP** site and its resources. Please come prepared with your specific question(s) to make the most of your scheduled time.

**Click HERE to schedule your 20-minute session now**

***Need more time?6***
Contact the **HR Help Desk**

**Mornings:** 9:30 – 11:30 a.m.
Wednesdays and Fridays

**Afternoons:** 1:30 – 4:30 p.m.
Mondays through Fridays

# RESOURCES

## CONTACT INFORMATION

### HRSTM: PDAP, Wellness, HR Help Desk, EELR

- PDAPRequests@montgomerycollege.edu
- Megan.Cooperman@montgomerycollege.edu
- HRSTM@montgomerycollege.edu
  - 240-567-5353
- EmployeeRelations@montgomerycollege.edu

### OBS: AP, Procurement, Finance

- AccountsPayable@montgomerycollege.edu
- Procure@montgomerycollege.edu
- Finance.OBS@montgomerycollege.edu

**For technical problems related to Workday access, please contact the IT Service Desk**

- ITServiceDesk@montgomerycollege.edu
  - 240-567-7222

MONTGOMERY COLLEGE

# EXCEPTIONAL EDUCATION
# EXTRAORDINARY OUTCOMES