MC MONTGOMERY COLLEGE

Memorandum

To: Montgomery College Employees

From: Kathleen M. Boyer, Human Resources Manager
                  Sophia L. Mason, Director, Human Resources Business Services
                  Office of Human Resources and Strategic Talent Management

Subject: **FY23 Updates and Important Reminders for the Educational Assistance
                  Program, EAP Travel, and the Professional Development Assistance Program**

Date: December 7, 2022

Greetings! The purpose of this memo is to provide updates and important reminders about the Educational Assistance Program (EAP), EAP Travel, and the Professional Development Assistance Program (PDAP) for the remainder of FY23. EAP and EAP Travel are for full-time faculty, non-bargaining and bargaining staff, department chairs, and administrators. PDAP is for bargaining part-time faculty who meet eligibility requirements.

New and Improved EAP Resources

We are aware that engaging with the EAP process in Workday is still new to many employees and continues to be challenging for some in the College community. We have listened to and tracked frequently asked questions and suggestions from employees and updated the EAP Resource Guide to include additional information and guidance to improve the process. The EAP page of the HRSTM website has the current EAP Resource Guide, as a document and a recorded presentation, demo videos, information and timing for taxable income, and newly updated FAQs. Please be reminded that aside from changing from a paper process to an online process in Workday, the overall process to request EAP benefits is the same. In other words, the *how* has changed, but the *what* for the most part has not. We thank you in advance for your continued patience and cooperation as we all continue to work and learn together.

Final Invoice and Expense Deadline for 2022

As the year winds down, please note that all invoices and expense reports, including all EAP and PDAP requests, must be submitted and **fully approved by COB on Wednesday, December 21** in order to be processed during the final check run prior to Winter Break. Fully approved means approved by the Manager and HRSTM. All submissions approved on or after Thursday, December 22, 2022 will be processed during the first scheduled check run after the return from Winter Break on Thursday, January 5, 2023.

EAP Acknowledgement Form

Beginning January 1, 2023, employees will be required to complete and submit an [EAP/PDAP Acknowledgement Form](#) with the documentation uploaded for all EAP requests, except EAP Wellness reimbursements. This form will ensure that all employees understand the EAP policy regarding eligible EAP services [[College P&P 35001, Compensation Programs (XIX, A)](#)] and the consequences of having to repay the College should the employee not attend or complete the program, course, seminar, etc. or secure a satisfactory grade upon completion of a credit course, and their liability when receiving taxable benefits above the IRS limit. It will also aid employees with confirming the Activity Type, Spend Category, and Activity Code in advance of entering into Workday to aid with the process of entering the request into Workday. If one does not submit the acknowledgement form, then the request will be sent back to the employee to retrieve this document and processing will be delayed. Employees are encouraged to begin using the acknowledgement form as soon as possible to start getting used to using it to capture the details of their EAP request.

Taxable Income

Also starting in 2023, we will do more to communicate and remind employees about the tax liability for tuition above the IRS limit and all wellness requests. **For any employee who receives more than the IRS limit for educational benefits during the calendar year, the amount over the limit becomes taxable income. This amount is $5,250 for 2022. All wellness reimbursements and incentives are always taxable.** We will communicate directly with all affected employees and will continue to send general information and reminders to all employees through various channels.

EAP Criteria, Approvals, and Justifications

All EAP requests must be approved by the appropriate supervisor, include an acceptable justification for how the request meets EAP criteria, and supporting documentation is required. **EAP requests should help employees: improve job-related knowledge and skills to perform more effectively in current job, complete a job-related degree-seeking or certification program, and/or prepare employees for a different or higher-level position at the College.** Requests will be processed in the order they are received. If you have encumbered travel funds but are no longer planning to go on your trip, please cancel your Spend Authorization in Workday and [contact us](#) as soon as possible so that we may release the funds for others to use.

Advanced Approval for EAP Travel

We will continue to keep the College community informed of the status of EAP and travel funds. **Please remember that all travel, whether using EAP or long-distance (departmental) funds, requires pre-approval PRIOR to travel.** 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 by

submitting a spend authorization in Workday (for reimbursements) or contacting HRSTM at EAPRequests@montgomerycollege.edu (for prepay requisitions).

Proof of Completion

As a reminder, employees using EAP 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 request 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-covered expense, please email applicable documentation to EAPRequests@montgomerycollege.edu.

EAP Utilization

The breakdown of EAP, EAP Travel, and PDAP utilization by employee constituency for the first quarter of FY23 **as of October 10, 2022** is located on the EAP page of the HRSTM website. Please note that utilization updates will continue to be posted on a quarterly basis.

If you have any questions, please contact EAPRequests@montgomerycollege.edu. Thank you.