



Exempt Professional Development Program

Conference, Seminar, Training Events Vendor-Direct Payment or Reimbursement Policy and Procedures

PURPOSE

The Exempt Professional Development Program (EPDP), authorized by Ohio Administrative Code 123:1-39-01 and governed by this policy, is designed to provide funding for professional development opportunities for exempt employees. This policy addresses attendance to state job related professional conferences, seminars, training events. The Vendor-Direct Payment option allows employees to avoid direct incurrence of costs and for the State to make a payment directly to a vendor on the employee's behalf. The reimbursement option reimburses an employee who personally pays for the event up-front.

CONFERENCE, SEMINAR, AND TRAINING EVENTS

Conference, seminar and training events include: short-term training programs, workshops, seminars, conferences and computer training. The event must provide knowledge or skills which could reasonably be expected to relate to any of the major job classifications currently used in the State of Ohio.

EMPLOYEE ELIGIBILITY

All full-time and part-time permanent employees of a participating agency, who are paid directly by warrant of the director of OBM and are exempt from collective bargaining, are eligible to participate if the following conditions are met:

- ▶ Employee is in active pay status, defined as not being on partial or full-time disability leave, workers' compensation leave, administrative leave or other leave of absence at the time of application and/or beginning of the program.
- ▶ Employee has at least six months of current, uninterrupted service as a State of Ohio employee.
- ▶ Employee is still employed by the state of Ohio when final paperwork is submitted.

Employees who separate employment due to a layoff and who were pre-approved to receive reimbursement will be reimbursed if all other requirements are met.

ASSISTANCE AMOUNT

Full-time, permanent employees are eligible to receive a maximum of \$1,500 per fiscal year for professional development events (including reimbursement and vendor-direct payment combined).

Part-time, permanent employees are eligible to receive a maximum of \$750 per fiscal year for professional development events (including reimbursement and vendor-direct payment combined).

Disbursement of funds is contingent upon the availability of funds.



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EVENT ELIGIBILITY GUIDELINES

For an event to qualify for pre-payment/vendor-direct payment or reimbursement, it must meet the following criteria:

- ▶ Provides knowledge and/or skills, which could reasonably be expected to relate to any of the major job classifications currently used in the State of Ohio.
- ▶ The event provider must appear on the Office of Budget and Management's Ohio Payment Card Approved Service Vendor List and is either a government entity or corporation. You may view the vendor list at <http://obm.ohio.gov/SectionPages/ElectronicCommerce/PCardServiceVendorList.aspx>.

If the provider does not meet this requirement, the employee must submit an Application for Conference, Seminars, Short-Term Training Reimbursement (see below)

Participants may not use direct vendor payment or reimbursement for the same event more than once per fiscal year.

ELIGIBLE EXPENSES: cost of instruction and instructional materials up to \$1,500 and not to exceed your current EPDP \$1,500 fiscal year balance (e.g. course manuals and other non-equipment related materials needed to support the learning).

INELIGIBLE EXPENSES: non-instructional fees; certification, testing, licensing and membership fees; course equipment fees; hardware and commercial software fees; travel expenses (including transportation, lodging, and meals); and self-instructional courses.

Vendor-direct payment is not available for events for which scholarships or grants have been received or an agency has paid. Additionally, if event exceeds \$1,500 or employee's fiscal year balance does not cover the event, costs will not be covered or reimbursed.

APPLICATIONS

Applications must be submitted via email for pre-approval 20 business days prior to the event registration deadline to ensure the availability of funds and to allow appropriate processing time.

After December 1, 2008, all applications **MUST** be submitted via email to epdp@das.state.oh.us; no applications will be accepted via standard mail, fax, or in paper form. Please contact our office if you require a reasonable accommodation.

If approved, payment will be made directly to the vendor, for prepay/direct pay vendor(s) only, and the EPDP staff will also register you for the event.

PROCEDURE

To Apply For Direct Payment to the Vendor:

- ▶ Check to ensure that the vendor is on the OBM Approved List of Vendors at <http://obm.ohio.gov/SectionPages/ElectronicCommerce/PCardServiceVendorList.aspx>. If the vendor is on the list, complete the Vendor Direct Pay application, attach a completed registration form with vendor contract information and e-mail to EPDP office no later than 20 days prior to the event registration deadline.
- ▶ If the vendor is on the list, complete the Vendor Direct Pay Application no later than 20 days prior to the event registration deadline, attach a completed registration form with contact information and e-mail them to the EPEP (epdp@das.state.oh.us) office prior to the beginning of the event.
- ▶ The EPDP office will enroll you in the program and pay the vendor directly.



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- ▶ Attend the event.
- ▶ Provide proof of completion via email (epdp@das.state.oh.us) within 30 business days of the conclusion of the event. (Failure to do so may adversely impact future eligibility to participate in the Exempt Professional Development Program.)
- ▶ Acceptable proof includes a certificate of completion issued by the event provider or a statement from the provider on their letterhead, or
- ▶ A memorandum from your manager, on your agency's letterhead, stating that you attended this program
- ▶ Do not include social security numbers or financial data.

To Apply For Reimbursement:

- ▶ If the vendor is not listed on the approved vendor list, is not a governmental entity or corporation, or if the event costs more than \$1,500 or if you have missed the deadline for the Vendor Direct Pay option, you may pay for the event and get reimbursed as follows:
- ▶ Complete the Application for Conference, Seminars, Training Event Reimbursement form and email it to the EPDP office (epdp@das.state.oh.us) 10 business days prior to the event registration deadline.
- ▶ Upon approval, enroll in and attend the event.
- ▶ Provide proof payment, proof of completion (see 5a above) to the EPDP office within 30 days of the conclusion of the event.
- ▶ Get reimbursed.

Additionally, a direct deposit form should be completed and returned directly to the Office of Budget and Management (OBM). If a deposit form is not filed, this could significantly delay reimbursement. The form and instructions may be found at <http://obm.ohio.gov/MiscPages/Forms/default.aspx> (Forms: Forms: EFT - Direct Deposit Form OBM-1234.)

AMENDMENTS TO ORIGINAL APPLICATION

If scheduling problems occur, and changes need to be made, amendments may be submitted. To submit an amendment, re-submit the application with the new information (event change, etc.) and indicate that it is an amendment. In the text of the email, outline the specific change to the original application. The amendment must be received prior to the date of the event. For amendments that add to the cost of the original request (i.e. adding or changing events), approval will be contingent upon available funds for the employee and the program.

CANCELLATION POLICY

Employee must comply with the event provider's cancellation policy by contacting EPDP in advance of the provider's deadline.

Any loss of EPDP funds will count toward the employee's fiscal year allotment and may result in ineligibility to utilize future Professional Development Events Pre-Payment for one (1) year from the event date.

APPEAL

Any employee who has been denied approval for use of EPDP funds or reimbursement may appeal to the administrator of the Department of Administrative Services' Human Resources Division, Office of Learning and Professional Development. If the appeal is denied by the administrator, the employee may appeal to the deputy director of the Department of Administrative Services' Human Resources Division. The deputy director's decision will be final.