

Shepherd University
Classified Employee
Staff Development Reimbursement Guidelines

May 2005
(Revised)

The following steps are necessary to **apply** for Staff Development funds:

1. The applicant will complete and sign the Application for Staff Development Funds and have the Org Unit Manager sign it.
2. The applicant will forward the application to the Director of Human Resources for signature.
3. Director of Human Resources will sign and forward the application to the Chair of Staff Development.
4. Chair will forward application back to applicant after signing.

Required steps for **reimbursement** of Training and Development expenses:

1. Personal Reimbursement—
 - a) Vendor's Invoice and original receipts showing expenses are required for reimbursement (be sure to include appropriate funding for staff development 104300/104000/715200).
 - b) Attach copy of approved application with Vendor's Invoice and forward to Chair of Staff Development for approval.
 - c) Chair will forward to Procurement for payment.
2. Payment by Purchasing Card—
 - a) Attach receipt with current month's visa log along with a copy of approved application for staff development.
 - b) Include correct funding for staff development on purchasing card log sheet (104300/104000/715200) to ensure the expense is charged to correct budget.

Required steps for **reimbursement** of Travel expenses:

1. Personal Reimbursement—
 - a) Travel authorization should be submitted prior to traveling with approved staff development application attached.*
 - b) Travel settlement should be completed with all original receipts attached.
 - c) Include the correct funding on travel settlement to ensure the expense is charged to the appropriate budget (104300/104000/712600).
 - d) Obtain supervisor's signature and forward to Procurement for payment.
2. Payment by Purchasing Card—
 - a) Attach receipt with current month's visa log along with a copy of approved application for staff development.
 - b) Include correct funding on purchasing card log sheet (104300/104000/various) to ensure the expense is charged to correct budget.

*If approved application was not received prior to traveling, attach to settlement noting funding change.