

Checklist for Professional Development

Employee Travel

Before travel:

	Travel Authorization Form	See the policies and procedure for exceptions
	Out-of-State Essential Travel Authorization Form	For all Outof-State Travel. President's approval required
	Certificate of Exemption (Tax Exempt) Form	To prevent tax being charged to a purchase or acquisition

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Group Travel (additional forms needed)

	Travel Authorization Form for each person	See the policies and procedure for exceptions
	Individual meal receipts for each person	This includes if one person pays for someone else.

Coursework

[Requisition](#)

Working Condition Educational Fringe Benefit - General Guide

Is the education needed to meet the minimum educational requirements of the position?	No – The educational reimbursement NOT taxable. Yes- The educational reimbursement is taxable
Is the education part of a program of study that can qualify the employee for a new trade or business?	No – The educational reimbursement NOT taxable. Yes- The educational reimbursement is taxable
Is the education required by the employer, or law, to keep the present salary, status or job?	No – The educational reimbursement is taxable. Yes- The educational reimbursement NOT taxable.
Does the education maintain or improve skills required in doing the present work?	No – The educational reimbursement is taxable. Yes- The educational reimbursement NOT taxable.

*Note: Accumulative amount up to \$5250 can be exempt from tax status.



FACULTY APPLICATION FOR PROFESSIONAL DEVELOPMENT FUNDS

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