

Local 1600 Union Professional Development Reimbursement Expense Request Form

➤ Instructions:

- Complete this form and obtain all required signatures.
- Attach this document in a PDF file format to your online Travel Authorization (TA) request that must include a copy of conference, training, and course schedule with the to and from dates, agenda and cost(s).
- Please do not register for a conference or make purchase until this document & your online TA request have been completely approved because you will be ineligible for expense reimbursement.
- Please be advised applications for a course/class must be submitted within 30 days after your class begins or it will be ineligible for reimbursement.
- Please include any supporting documentation that is related and beneficial to your request.
- All professional development reimbursement expense request must be submitted within 15 days from the last day of travel and/or purchase.
- All tuition reimbursement expense request must be submitted no later than 30 days after the last day of class that includes a grade report(s) and proof of payment(s).

➤ Memberships:

- All membership request requires the Professional Membership Request form that must be approved by the Union Committee Chairperson and the Department of Community Relations & Development.
 - a. All union membership request are reimbursable only and must be prior approved before making a purchase.
 - b. The Professional Membership Request form does not require a TA because the prior approved membership form replaces it.
 - c. Please attach the approved Professional Membership Request form and receipt as proof of purchase (PDF) to your online Travel & Expense (TE) Reimbursement request in order to be reimbursed.
- If you require assistance your first point contact is your home campus Business Services Office.

Special Notes:

- **CCC Employees that are covered by a collective bargaining agreement are required to comply with all district travel and expense reimbursement policies and procedures, including GSA.gov per diem rates for hotels, meals & incidentals as stated in paragraph 1.9.3.a; in Board Report #33109.**
- **Expense Reimbursements for Professional Development and Tuition combined cannot exceed:**
 - \$3,000 per fiscal year for Full Time Local 1600 Union Employees under the Local 1600 Faculty & Training Specialists contract; plus \$3,000 Reimbursable Travel Expenses.
 - \$3,000 per fiscal year for Full & Part-Time Professional Personnel under the Local 1600 Professional Employees contract; plus \$1,600 Reimbursable Travel Expenses.
- **Additional Tuition IRS Tax Cost associated with paid Tuition Reimbursement Expenses that exceeds \$5,250 per calendar year:**
 - Per IRS regulation for school tuition if any CCC employee exceeds \$5250 per calendar year it will become imputed taxable income.
 - a. This means the amount that exceeded the \$5250 is imputed as taxable income (only federal & state taxes are calculated on the overage amount and not the gross amount).
 - b. The overage amount is included in the employee's last payroll calendar check (PPE 26) of the year. **(Payroll code TRT – Description; Tuition Taxable > 5250)**
 - c. For an example an employee was paid in calendar 2019 for **(SP \$3000 & FA \$3000=\$6000; taxed on \$750;)** or **(FA \$1800, SP \$1200, SU \$3000 = \$6000; taxed on \$750)**
 - Any tuition that's submitted after December 16th or the first pay period date in December will be reviewed and approved by AP but payment reimbursement will not be released until after January 1st.
 - Please be mindful your tuition submissions, approvals and payment disbursements are all about timing, which may affect you at the end of a CCC HR Payroll calendar year.

FISCAL YEAR ENDS ON JUNE 30TH. PLEASE BE MINDFUL EMPLOYEE REIMBURSEMENT REQUESTS MUST BE SUBMITTED NO LATER THAN 30 DAYS AFTER THE LAST DAY OF CLASS AND 15 DAYS AFTER LAST DAY OF PURCHASE FOR THE CURRENT FISCAL YEAR. IF NOT YOUR REQUEST IS INELIGIBLE FOR REIMBURSEMENT AND IT WILL BE DENIED.

Pre & Post Travel Authorization (TA) and Travel Expense (TE) Reimbursement Request Check Lists

TA Estimated Expenses/Quotes Required:	Yes	No	Comments:	TE Actual Travel Expenses/Receipts:	Yes	No	Comments:
Official Announcement: Agenda or Invitation to conference, seminar, training, meeting (internal or external)			Required on all TA	Travel Expense Summary Cover Page			Required with all TE Expenses that are not itemized by day
Registration Fee			When applicable; If yes makes sure the form is filled out completely. The vendor's payable to and remittance address are part of your support backup and/or in the PS vendor dbase system	Link Approved Travel Authorization Number (i.e., transaction id # 5012)			Required with all approved TA
Airline Carrier Name			When applicable; Required	Registration Confirmation (proof of payment)			When applicable
Flight/Train Cost			When applicable; (avg. \$450)	Actual Carrier Name			When applicable; Name required
Auto Travel (Requires annual Travel Mileage Driver License and Insurance Agreement)			When applicable; required annually per fiscal year (>July 1 st)	Actual Flight/Train or other mode transportation cost (Boarding Pass or receipt from Concur)			Required with all Airfare Purchases
Car Rental			Approved as exception- must provide detailed explanation demonstrating rental is cheapest mode of travel	Car rental			When applicable
Lodging			When applicable; govern by GSA rates	Parking			When applicable
Anticipated Parking Expenses			When applicable; \$25 per segment	Lodging (itemized by day)			When applicable
Meals Allowance (GSA)			When applicable; govern by GSA rates; 1 st & last day is 75% of maximum meal allowance	MapQuest/Google Maps (exclude campus-to-campus)			When applicable
Miscellaneous Expenses (i.e. shuttle, taxi, tolls, etc.)			When applicable	Meal Allowances (detailed itemized receipt by day)			When applicable; GSA rate for 1 st & last day is 75% of maximum allowance
Membership fees (Require Membership Authorization Form)			When applicable; requires the Professional Membership Form	Membership fees			When applicable
Relevance to Position			When applicable	Miscellaneous Expenses (i.e. shuttle, taxi, tolls, etc.)			When applicable
Late Explanation required for 30 days and less submissions			When applicable; required online TA	Proof of Conference Attendance & Synopsis (i.e. badge, agenda)			When applicable
Non-Purchase Order related expense request pertaining to instructional supplies only (i.e. Hearts)			Relevant expense quotes	Special Note: All Travel Expense Report requests must be submitted within 15 days from your last day of travel or purchase.			



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Application:

Employee Type: FT-Faculty FT-Training Specialist FT-Professionals PT-Professionals

Applicant: _____ Title: _____ College: _____

Date(s) of absence (if applicable) _____ Begin: _____ Return: _____

Person in charge during your absence (if applicable): _____

Title of Conference/Class(es): _____

Date(s) of conference/class(es): _____ Begin: _____ End: _____

Specify how the conference/class or professional membership relates to your current job and probable future job is beneficial to City Colleges of Chicago:

Please attach your documentation estimated cost(s) to this request that must be also included in your online Travel & Authorization: The conference agenda, conference or tuition/registration cost, airfare quote, memberships, course books and other relevant documentation to substantiate your expense reimbursement requests.

Course/Conference or Membership Title	Course/Conference Dates	Select Expense Type	Amounts
		Conference ▼	
		Membership ▼	
Total PDF Tuition/Conference Expenses			\$0.00
Travel Related Expenses			

Business Services Office: Must review and complete this section before attaching this document as support and submitting it through the Travel and Expense approval workflow.

Have you been reimbursed in this current fiscal year? Yes or No:

If yes please complete the following fields:	Conference/Tuition or Membership	Select Expense Type	Conference ▼
	Conference/Tuition or Membership	Select Expense Type	

Comments:	Allowable or Remaining PDF Balance
	Travel Reimbursement Expenses
	Allowable or Remaining Travel Balance

Indicate Funding Source Chartfield for Professional Development and/or Tuition Reimbursement: _____

Signatures Required: Date

Applicant:	
Print Name: _____	
Union Committee Chairperson:	
Print Name: _____	
President:	
Print Name: _____	

Comments: _____

After this form has been completed and approved please attach it and all supporting documentation related to your expense request to your online TA/TE Authorization for further processing.

Release of a Travel Expense Reimbursement Request is contingent upon the receipt of all required attachments and online reviewers and management approvals. If request is missing any required information and/or support documentation it will be returned to the Employee via email through the online T&E Module email notification process.

Please be mindful to always seek your home campus Business Services Office first for assistance or guidance regarding the Travel and Expense Module processes and forms.