

**Faculty/Staff Checklist for Professional Development and Travel**  
**For PD instructions: [http://yorktech.edu/PD\\_eTravel\\_Authorization\\_Instructions.pdf](http://yorktech.edu/PD_eTravel_Authorization_Instructions.pdf)**

**Pre- Approval**

1. Identify professional development activity, such as conference, workshop, course (s) to attend/complete – needs to align with College mission and performance goals
2. Discuss your professional development activity with direct manager/supervisor
3. Complete PDC “Project Application” [http://www.yorktech.edu/PDC/pdc\\_forms.php](http://www.yorktech.edu/PDC/pdc_forms.php) 
  - a. Identify appropriate costs associated with activity
  - b. Identify hotel costs if applicable (Parking, Taxes, Internet, transportation to conference, etc.)
  - c. Mileage to/from work to airport
  - d. Identify airline flight costs 
    - Mann Travel (\$30)
    - Bags
    - Transportation to/from airport to conference – (Taxi, Shuttle, etc.)
    - Parking
    - Rental (if applicable/appropriate)
    - Meals (per diem) 
      - In-state: \$6 Breakfast, \$7 Lunch, \$12 Dinner
      - Out-of-state : \$7 Breakfast, \$9 Lunch, \$16 Dinner
  - e. Attach required support documentation, such as conference or workshop brochure/schedule or course description and schedule (current or past year)
4. Send to direct supervisor for review and approval within PDC cycles [http://www.yorktech.edu/PDC/pdc\\_cycle.php](http://www.yorktech.edu/PDC/pdc_cycle.php)

**Approval – Before trip**

1. Receive confirmation from PDC to attend professional development activity
2. Start Professional Development e-form by sending e-form to Organizational Coordinator- Teresa Smith [http://www.yorktech.edu/PD\\_eTravel\\_Authorization\\_Instructions.pdf](http://www.yorktech.edu/PD_eTravel_Authorization_Instructions.pdf)
3. Organizational Coordinator initiates form and routes back to traveler. Read travel guidelines before completing form. Complete travel section and route to direct supervisor for approval.
4. If credit card or rental car is needed make sure to check appropriate box.
5. If credit card/car is requested (if approved by direct supervisor) e-forms AP Clerk receives an approval email and direct supervisor returns the form to traveler. Review to see if credit card was approved. Schedule a time with Accounting (x. 2875) to pick up the credit card.
6. Make an outlook reminder to pick up/return credit card
7. Complete registration for professional development activity
8. Submit payment information for professional development activity (cannot use college credit card, must use check request, or p-card if the conference registration is under \$1500.)
9. Verify payment has been submitted prior to attending conference/workshop
10. If applicable book airline flights with Mann Travel
11. If applicable reserve hotel
12. If applicable reserve transportation (to/from airport/hotel/conference, etc.)

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**Prior to trip – Credit card**

1. Pick up the credit card from Accounting and sign out card
2. Return credit card to Accounting on next business day upon return from trip
3. **NOTE\*\*\*\*\*** some hotels will not take a credit card if your name is not on the card\*\*\*\*confirm with hotel their process before you leave. If this is their process contact accounting prior to travel for appropriate paperwork.

**Upon completion of professional development activity**

1. Go online to get PD evaluation form under Professional Development/PDC forms [http://yorktech.edu/PDC/pdc\\_forms.php](http://yorktech.edu/PDC/pdc_forms.php)
2. Complete the evaluation, print, have direct supervisor sign and send to Teresa Smith.
3. For reimbursement complete the e-form and electronically attach receipts with the details of the trip to include actual costs (hotel, mileage, baggage, shuttle, airline etc.) Attach scanned copy of support documentation, such as conference agenda, grades and other related information.
4. Send to direct supervisor who sends to e-forms AP Clerk upon approval.