



EPDA PROCESS

2021-2022



Employee Professional Development Account (EPDA)

NAIT will contribute \$800.00 per year (prorated for part-time staff) to a maximum of \$2400 into an individual Employee Professional Development Account (EPDA) for each staff member. (Section 24 of the NAIT/NASA Collective Agreement)

However, newly hired NASA members are not eligible for EPDA funding until they have completed one (1) year of employment.

Although EPDA is administered by the NASA office, it is NAIT funded; therefore, **expenses must be in accordance with NAIT guidelines.**

Funding can be used to participate in courses, programs, conferences, seminars and workshops, Educational Material (the purchase of subscriptions to professional journals, educational software, reference material or textbooks) or the payment of Membership Dues/Fees in a Professional Association that is not covered under Section 35. Hardware, such as computers are **NOT** permitted.

There are a variety of avenues for academic members to receive professional development funding.

1) Program/School/Institute Funding

If the program is providing funding to cover the entire cost complete the NAIT Travel Authorization and include a breakdown of all expenses. Submit the form for approval according to [NAIT Guidelines](#). As per the Collective Agreement any professional activity that is required by the program shall be funded exclusively by the program. **Note: Expenses must be in accordance with NAIT guidelines.** Travel forms can be found on the NAIT website under [eforms](#).

TRAVEL AUTHORIZATION and ADVANCE REQUEST and CERTIFICATE OF INSURANCE		Reset Form	Print Form																														
Employee Name: _____		Employee ID #: _____																															
Supervisor's Name: _____		Check one Account: <table border="1"><tr><td><input type="checkbox"/></td><td>5</td><td>5</td><td>0</td><td>1</td><td>0</td></tr><tr><td><input type="checkbox"/></td><td>5</td><td>0</td><td>7</td><td>0</td><td></td></tr><tr><td><input type="checkbox"/></td><td>5</td><td>1</td><td>4</td><td>5</td><td>0</td></tr><tr><td><input type="checkbox"/></td><td>5</td><td>1</td><td>4</td><td>6</td><td>0</td></tr><tr><td><input type="checkbox"/></td><td></td><td></td><td></td><td></td><td></td></tr></table> Travel General		<input type="checkbox"/>	5	5	0	1	0	<input type="checkbox"/>	5	0	7	0		<input type="checkbox"/>	5	1	4	5	0	<input type="checkbox"/>	5	1	4	6	0	<input type="checkbox"/>					
<input type="checkbox"/>	5	5	0	1	0																												
<input type="checkbox"/>	5	0	7	0																													
<input type="checkbox"/>	5	1	4	5	0																												
<input type="checkbox"/>	5	1	4	6	0																												
<input type="checkbox"/>																																	
Dept. Name: _____		Staff Dev. Sem. Con.																															
GL Coding Fund Department Project (if applicable): _____		Staff Dev. Academic																															
		Other (specify): _____																															
A. Travel Authorization Request																																	
<input type="checkbox"/> All-in-one <input type="checkbox"/> Out-of-Area <input type="checkbox"/> Out-of-Country <input type="checkbox"/> Personal (employee's own time within continental United States)																																	
Purpose of Trip and other relevant information (attach agenda and relevant documents) (if space below is not sufficient):																																	
Name of the NAIT program/school/institute to be visited:		Familiarity of my knowledge of the site: Will complete training no conference/travel YES ___ NO ___ (NO provide details in the box above)																															
Destination: _____		Employee Signature: _____ Date: _____																															
Date of Departure: ____/____/____		Date of Return: ____/____/____																															
Check only if paid for by NAIT (that is, not by you):		As host to travel, you will be responsible for any out-of-pocket and non-reimbursable expenses.																															
<input type="checkbox"/> Air/Vehicle	Estimated Costs: _____	Department supervisor signature: _____ Date: _____																															
<input type="checkbox"/> Accommodation	_____	- unless approved by you, do not provide for other than:																															
<input type="checkbox"/> Meals	_____	Airfare (to/from signature) _____ Date: _____																															
<input type="checkbox"/> Registration	_____	Authorizer Signature: _____ Date: _____																															
<input type="checkbox"/> Other	_____	Authorizer Signature: _____ Date: _____																															
Total Estimated Costs: _____																																	
B. Travel Advance Request (Complete only if a Travel Advance is required) (Part A must be completed)																																	
Total Estimated Costs: _____		Employee Signature: _____ Date: _____																															
Less: Direct Bill to NAIT: _____		Department supervisor signature: _____ Date: _____																															
Estimated Employee Expenditure: _____																																	
Advance Requested (Maximum 75%): _____																																	
C. Certificate of Insurance (if renting a vehicle, have your supervisor sign, return during travel)																																	

2) **Employee Professional Development Account** (Section 24.02(b) of the Collective Agreement)

Confirm your EPDA funding amount by emailing adelew@nait.ca or calling 780-471-8504, and/or Lana Bjorkquist at 780-471-8702 or emailing the NASA office at nasa@nait.ca.

If you have EPDA funding available to cover the entire cost complete the EPDA Application form.

Submit to your Supervisor to sign off for relevancy and time off from work to attend. Once this form is signed you can register, pay, and attend the activity. Hold onto the EPDA Application form until you are ready to submit your claim through NAIT's Online Travel and Expense system.



Learning Assignment, Education Material and Professional Membership Fee

Reset Form

Section A - Application (completed by Staff Member)

Employee Name _____ Employee ID _____
Program/Dept _____ Current Position _____

What is the benefit/relevancy of this Learning Assignment, Educational Material or Professional Membership Fee? (max of 200 characters)

Workshop/Conference/Seminar

Title _____ Dates MM/DD/YYYY to MM/DD/YYYY
Location _____ Number of days Absent _____

Costs						
Registration	Accommodation	Materials	Other	Food	Travel	Total
						\$0.00

Educational Course i.e. Degree, Certificate

Course Title _____ Dates MM/DD/YYYY to MM/DD/YYYY
Institution _____

Costs		
Registration	Materials	Total
		\$0.00

Time off if applicable MM/DD/YYYY to MM/DD/YYYY

Educational Material (Subscriptions to Professional Journals, Educational Software, Reference Material, Textbooks)

Professional Membership Fee (Fees paid to a professional association not covered under Section 35 of the Agreement)

Description of Item (max of 100 characters)

Total Cost _____

Is this Application in conjunction with Program Funding? Yes No If Yes, amount _____

Applicant Signature _____ Date _____

Submit Application to the Work Unit Supervisor for authorization

Section B - Authorization

To be completed by Work Unit/Supervisor
Signature indicates that activity is relevant to the Program/NAIT initiatives and operation needs will be met allowing the staff member to engage in PD activity. Support does not imply full funding. Approved Denied

Work Unit/Supervisor Signature _____ Date _____

Application to be returned to Staff Member. If denied, attach rationale for denial and send a copy to NASA

Section C - Expense Claim

Scan and attach to the on-line Travel and Expenses process. NASA Office (E230)

NASA Office (E230)

EDU-PMF-F01 02/05/2018

3) Combined Sources of Funding

If you are using Program and EPDA funding, the process is a little complicated as it requires that both the EPDA application **and** NAIT's Travel Authorization forms be completed for each area. Outlined below is a sample of the steps required when seeking and claiming funding from both sources.

Filling out the Application Forms

- a) Complete the online NAIT Travel Authorization form showing all proposed expenses. Indicate by asterisks (*) if and where other funding is being applied for.
- b) Complete the EPDA Application form (Learning Assignment, Educational Material & Professional Membership Fee). Indicate at the bottom of Section A the amount of other funding being applied for.
- c) Ensure you **sign the EPDA Application form** as it authorizes the NASA Office to release your EPDA funds.
- d) Submit both the NAIT Travel Authorization and the EPDA Application form to your Supervisor's approval. Once approved, hold onto both forms until after the activity.
- e) After receiving approval from both funding areas, you may register, pay, and attend the activity.

Applying for EPDA Funds and Completing the NAIT's Online Travel and Expense Claim

Please use the following steps when completing and submitting on to NAIT's Online Travel and Expense Claim. All forms along with the EPDA Application form are located on the NASA website.

1. Confirm your EPDA account balance by calling either Adèle Weichel at EXT. 8504 and/or Lana Bjorkquist EXT. 8702.
2. To access the EPDA application forms, please review the NASA website to enable you to print off, complete, and sign the [Application form](#). Ensure you **sign the EPDA Application form** and have your supervisor sign it. Purchase the item(s) or attend the event - keep your receipts as you will need to attach your completed EPDA application form and relevant documents to NAIT's Online Travel and Expense claim process.
3. Please note when booking flights, you are encouraged to make reservations through Uniglobe Travel; however, you **cannot charge** your airfare expense to NAIT's account and/or the EPDA account as you are required to **you pay for your own flights**. Failure to comply with this request may result in the department program or you will be charged to pick up the expenditure due to not having sufficient EPDA funding to cover your expenses.
4. To access NAIT's Online Travel and Expense Claim process you must go to your employee profile on the staff portal located on the NAIT staff network.
5. To complete the online process, below are various screen shot of an expense claim when using EPDA funding. In order to ensure the expense is charged to EPDA, please insert the EPDA department ID **120306** or your individual department ID code if funding is not covered fully by EPDA funds and is being partially covered by your own department.
6. Once again, prior to completing the claim, you will need to determine what funding amount is covered by EPDA and your department (if any) to eliminate it from being sent back for revision. Once you have determined the funding that is covered by EPDA and your department, then you will enter all the expenses and identify what portion is covered by EPDA (**120306**).

7. You will be required to scan and attach your EPDA application form, along with all your relevant documents pertaining to your claim. **“Attachments”** icon is located under the **“Default Location”** section.
8. If the claim is to be split between EPDA and your department, you will have to determine what amount is covered under each department ID.

Once you have determined the amounts, you can then enter your expenses. However, in order to correctly allocate the amount to EPDA and department, you will need to select the line item under **accounting detail** which will you give access to reallocate the amount between EPDA (**120306**) and department expense codes. You must do this for each line item to ensure what appropriate funding amounts are allocated to EPDA (**120306**) and to the department.

Per Diems and Incidental Allowance

Meals and Incidental Expenses within Canada

The meal allowances (per day) without receipts are:

Breakfast:	\$15.00
Lunch:	\$15.00
Dinner:	\$30.00
Incidental:	\$10.00

Meals and Incidental Expenses outside of Canada

The meal and incidental allowance for travel to the United States or other destinations are the same as in Canada except the amounts are converted into the currency of that country.

This will be converted into Canadian funds at the conversion rates in effect at the time of travel. This can be computed from the actual rate paid for purchase of US dollars substantiated by a receipt, or rates as quoted on your credit card statements, or from a website such as <http://www.bankofcanada.ca/en/rates/exchange.html>

Cash Advance Requests

Cash Advance Requests are to be used only when travel expenses involve payment of flights. Conference registrations fees will only be reimbursed if the event corresponds with flights.

Please ensure that you attach your EPDA application form and payment receipts to the Cash Advance Request. As per NAIT guidelines if you receive a cash advance then your claim should be submitted within 20 days following your return to work.

Payment Process

Once you submit your claim to Adèle Weichel, it will be reviewed, and if no revisions are required, it will be forwarded to the HR designate and then forward to Accounts Payable.

Accounts Payable will ensure the appropriate amount are charged to the correct budget accounts. Reimbursement will be by direct deposit.

EPDA Deadline Dates:

To further eliminate payment delays, and stay within NAIT's fiscal year (July 1st to June 30th), please be advised that all NAIT online travel and expense claims must be submitted using the following schedule:

Expenditure Dates:

July 1st to September 30th
October 1st to December 31st
January 1st to March 31st
April 1st to May 15th
May 16th to June 15th

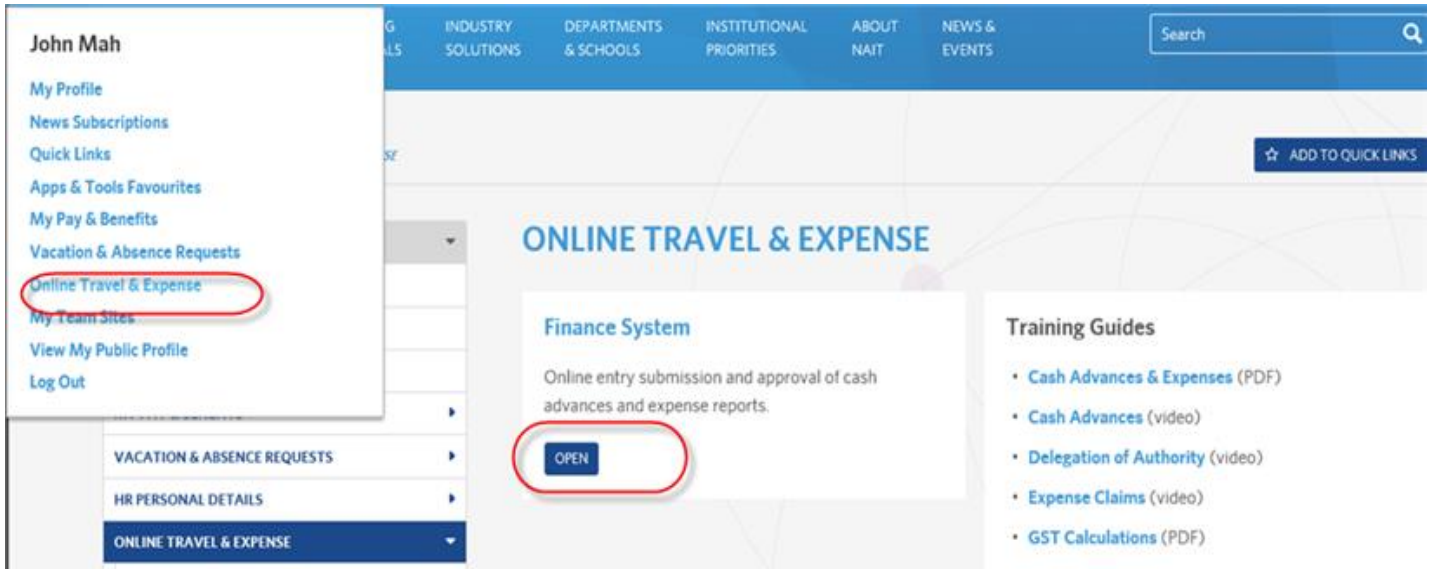
Deadline Dates:

November 15th
January 15th
April 15th
June 1st
June 25th

Failure to comply with the above specified schedule may result in non-payment of expenses.

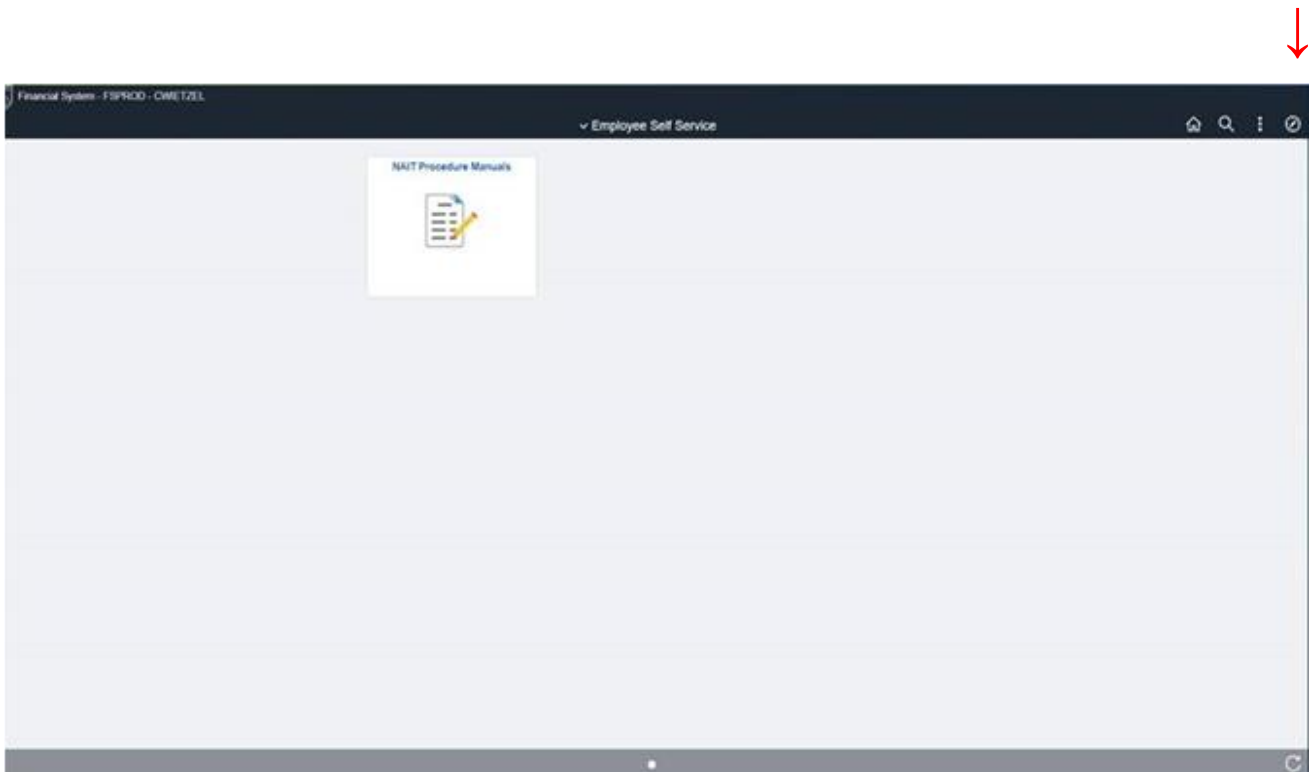
Steps for Creating an Expense Report

To Log into the Finance System, go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.



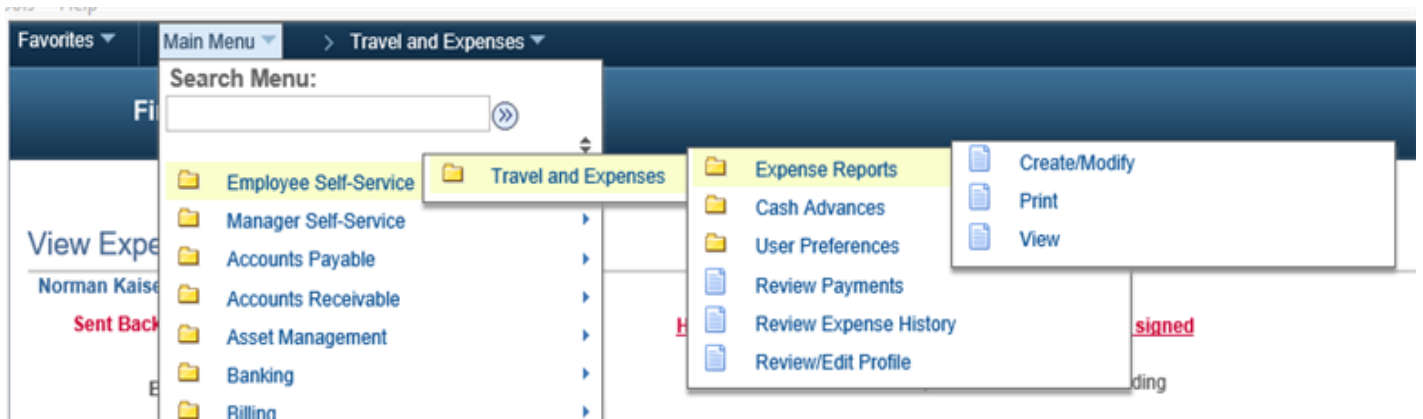
The upgraded system has a new look, and the screen shot below will provide you how to access through the NavBar/Compass icon on the top right-hand corner of the laptop and/or computer screen. **(RED↓ down arrow)**.

Please click the symbol and it will bring you to the next screen that is required to begin processing your claim. Once again, Pages 7 to 10 will be able to assist you in completing your claim.

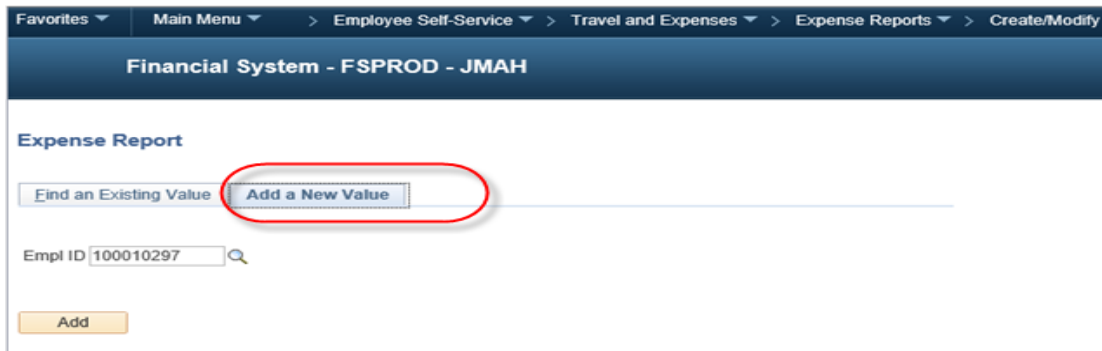


Once in the Finance System follow the link:

MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY



The first screen you will see illustrated below is to create a new expense claim in which it automatically selects the tab **“ADD A NEW VALU”** icon. Your Empl ID number will instantly populate. Click on the **“Add”** icon which will create a new expense claim.



Fill in the required General Information fields illustrated below.

Field Name	Field description:
Business Purpose:	NASA-Emp Prof Dev Acct
Report Description:	High Level Description of Expense details
Reference:	Do Not Use
Default Location:	NAIT
Attachments:	Under the Default Location: Click the “Attachments” icon to include EPDA application form, payment receipts, travel authorization if required, and per diem details.



The screenshot shows a section of the form with four input fields. The first field is labeled '*Business Purpose' and has a dropdown arrow. The second field is labeled '*Report Description'. The third field is labeled 'Reference' and has a search icon. The fourth field is labeled '*Default Location' and has the value 'NAIT' and a search icon. To the right of the '*Default Location' field is an 'Attachments' icon (a paperclip with a plus sign) and the word 'Attachments' in blue text.

To change the accounting defaults for the entire claim at a header level, one expense line must be entered. (Illustrated on the next page.)

When one expense line has been entered, the Quick Start menu seen above changes to an Actions menu in the top right corner. You must enter the EPDA department ID code **120306** and there is no project code.

Enter expense information in the details section. **The Amount should include all taxes and be the total amount of the expense.** For those expense types that GST cannot be calculated by the system, the employee must enter it from the receipt. This amount should only reflect GST and not include HST or PST amounts. If there is no GST, please click **“No GST”**.

Financial System - FSPROD - JMAH

Create Expense Report

John Mah

*Business Purpose: NASA-Emp Prof Dev Acct

*Report Description: Conference

*Default Location: NAIT

Expenses

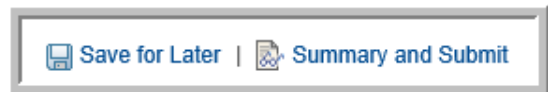
Total: 875.00 CAD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency			
07/01/2019	Conferences	conference registration 231 characters remaining	Employee Paid	525.00	CAD			
	*Billing Type: Internal	Receipt Split	<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable <input type="checkbox"/> No Receipt <input type="checkbox"/> No GST	*Exchange Rate: 1.00000000 Base Currency Amount: 525.00 GST: 25.00				
Accounting Details								
Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Project
525.00	NAIT	525.00 CAD		1.00000000	51450	01	120306	
07/01/2019	Per Diem-Within Canada	B/L/DI x 5days 240 characters remaining	Employee Paid	350.00	CAD			
	*Billing Type: Internal	Receipt Split	<input checked="" type="checkbox"/> Default Rate <input type="checkbox"/> Non-Reimbursable	*Exchange Rate: 1.00000000 Base Currency Amount: 350.00				
Accounting Details								
Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Fund	Dept	Project
350.00	NAIT	350.00 CAD		1.00000000	55010	01	120306	

To save but not submit for approval, click on the **“Save for Later”** icon located on the top right-hand corner.



To submit for approval, click on **“Submit Expense Report”** icon located on the top right-hand corner.



There still another step on page 10 that you need to complete before your claim is finally successfully submitted.

The final step is that it will bring you to another page whereby you must **Check the Box** illustrated below and then click on **“Submit Expense Report”** icon.

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

Once your expense claim has been **“Saved for Later or Submitted”** a Report ID will be assigned to you and the approval workflow appears. Example:

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Yvonne Blake	03/25/2019 11:10:13AM

[Return to Search](#) [Notify](#)

Modify an Existing Report

Log into the Finance System go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.

John Mah

- My Profile
- News Subscriptions
- Quick Links
- Apps & Tools Favourites
- My Pay & Benefits
- Vacation & Absence Requests
- Online Travel & Expense**
- My Team Sites
- View My Public Profile
- Log Out

VACATION & ABSENCE REQUESTS

HR PERSONAL DETAILS

ONLINE TRAVEL & EXPENSE

INDUSTRY SOLUTIONS DEPARTMENTS & SCHOOLS INSTITUTIONAL PRIORITIES ABOUT NAIT NEWS & EVENTS

Search

ADD TO QUICK LINKS

ONLINE TRAVEL & EXPENSE

Finance System

Online entry submission and approval of cash advances and expense reports.

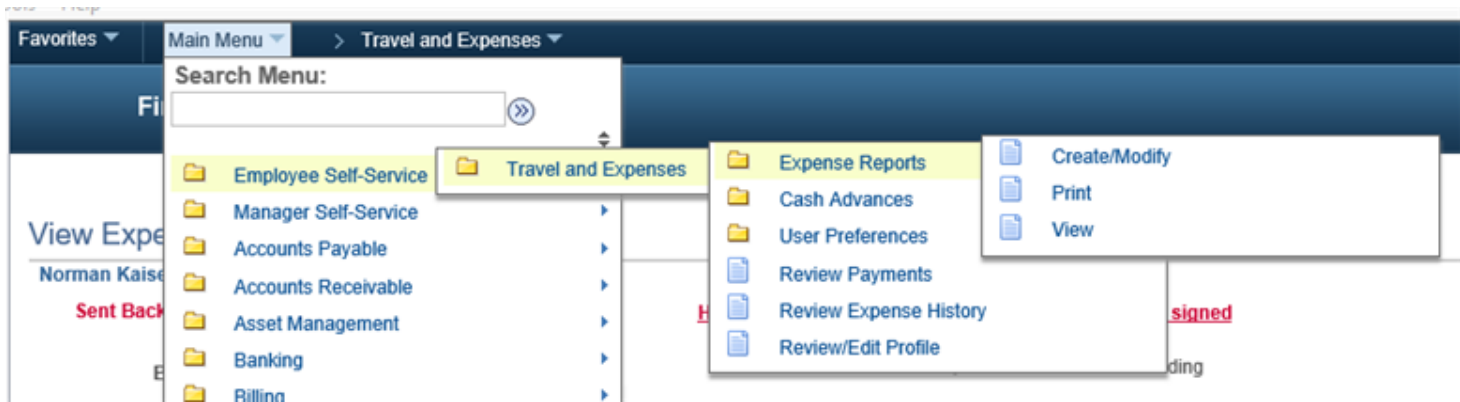
OPEN

Training Guides

- Cash Advances & Expenses (PDF)
- Cash Advances (video)
- Delegation of Authority (video)
- Expense Claims (video)
- GST Calculations (PDF)

Once in the Finance System follow the link:

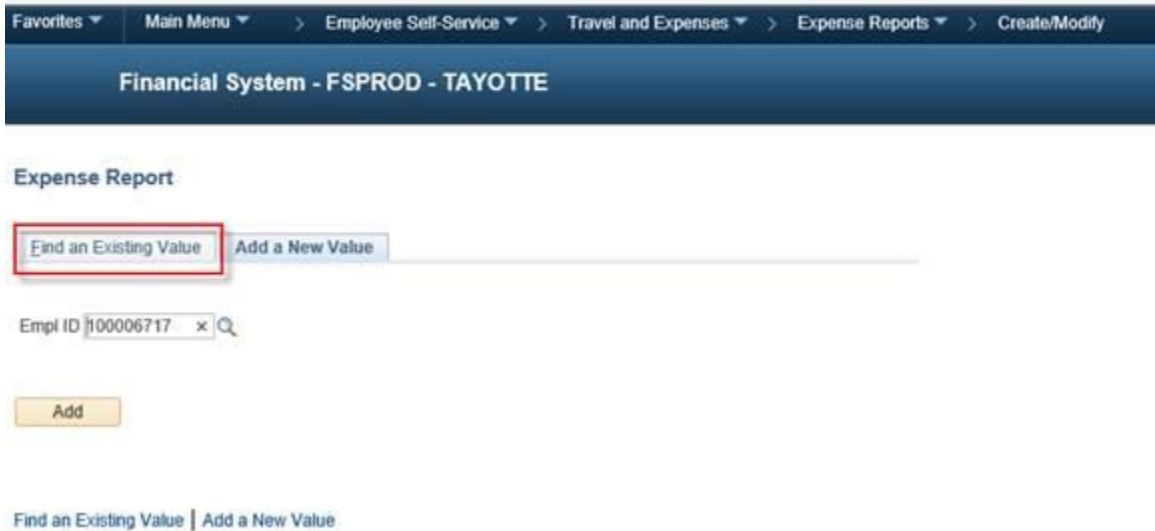
MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY



If an expense claim has been sent back to you for revision/correction you will need to click on **“Find an Existing Value”** icon in which you can either enter the **“Report ID”** or select **“Search”** icon to find any pending claim that have been sent back to you or claims that you have saved for later that are currently pending in your queue.

Select the claim to be modify and **read the comments** of those sent back as to what needs to be corrected and complete the revision and then resubmit the claim again.

Click on **“Find an Existing Value”** icon



Enter your Report ID and click **“Search”** icon– this will bring up any expense reports available to be modified



Expense Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Report ID

Report Description

Name

Empl ID

Creation Date

Case Sensitive

Do any modifications and then click on **“Summary and Submit”** – top right-hand corner

Quick Start

It will bring you to another page whereby you must **“Check the Box”** illustrated below and then click on **“Submit Expense Report”** icon.

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Completing Online Travel and Expense Claims using Remote VPN Access

While on leave such as working remotely or on vacation, NASA members can submit an expense claims using the Remote VPN access link. (See below)

<https://remote.nait.ca/global-protect/login.esp>

How-To Guides

The “how-to” guides for employees and reviewers/supervisors/budget owners are located on the NASA website and your NAIT Staff Portal under Online Travel and Expense.

Travel and Expenses: Employee Entry

Please visit: <https://www.naitacademicstaff.ca>

Click on Professional Development

Click on Employee Professional Development Account

Click on Travel & Expenses: Employee Entry