

WHY, WHEN, and HOW to Submit an FP&M Professional Development & Travel Request Form

**The people of FP&M are critical to fulfilling our mission to
 “Provide excellence in facilities and services to our university community”**


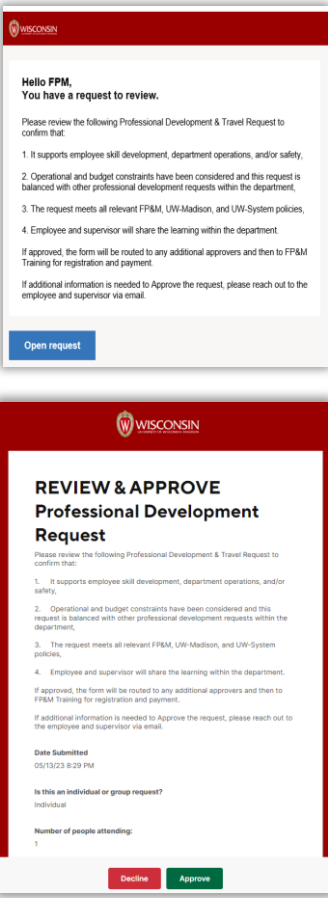
Ongoing learning and development helps our organization and our people succeed. Classes, conferences, memberships, subscriptions, licenses, and certifications are all elements of professional development and are reviewed by department leadership using the following framework:

- Skill development based on operational and safety needs
- Equitable access to development opportunities – free and for fee
- Budget goals

WHY:	The Professional Development & Travel Request form is used to pre-authorize any professional development activities with a cost or that require travel. It is used to manage schedules and budgets, track training, register and pay for requests, and ensure compliance with policies.
WHEN:	<p>Submit the FP&M Professional Development & Travel Request form at least 2 weeks prior to the event:</p> <ul style="list-style-type: none"> • to attend a class, conference, certification course, or meeting that has a cost, • to attend a class, conference, or meeting that requires travel, • to join a professional organization or subscription that has a fee, • to attend a conference – virtual or with travel. <p>You DO NOT need to fill out a form for free UW Learning & Talent Development classes or LinkedIn Learning. Learn more about free learning options at Inside FP&M/Training.</p>
HOW: Employee or Designee	<ul style="list-style-type: none"> • Talk to approvers before submitting the form. Confirm the request meets requirements of skill development based on operational or safety needs, equitable access, and budget. <ol style="list-style-type: none"> a. If the request requires travel, work with Travel Coordinator to ensure all documentation is included. • Go to Inside FP&M/Training to complete the online form. Include estimates of all costs and attach PDF’s of agendas, itineraries, mileage, flights, etc. <i>The form is an estimate – if actual costs are over \$100 different, a new form will have to be submitted.</i> • Form will automatically be routed based on type of request and cost. You will be notified by FP&M Training when registration and payment is complete. • Work with Travel Coordinator to finalize travel and process for any reimbursements. • Confirm time away with Supervisor and ensure coverage of duties.

HOW:
Approvers

- You will receive an email from FPM Training via Smartsheet. Click [Open request](#) to view detail. Employee should have discussed the request with you before submitting.
- Review all details – especially Funding String information and License or Certifications. License and Certifications require additional review.
- The request cannot be pushed back in the system. If you are declining because of inaccurate or missing information, email or talk to the requestor and supervisor. Explain why it is not approved and ask them to resubmit.
- Once approved it will automatically route to next approver based on type of request and cost:
 - ✓ Supervisor through Extended Leadership Team member = Under \$1000 with or without travel
 - ✓ Supervisor through Core Leader = Over \$1000 without travel
 - ✓ Supervisor through Core Leader + Deputy AVC Margaret Tennesen = Over \$1000 with travel
 - ✓ Supervisor through Core Leader + Training Manager; Alicia Meyer = Any Membership, Certification, License, or Exam

Employee talks to Approvers (+ Travel Coordinator if travel) then fills out request	Approvers Receives Email - Approve or Decline	Employee & Supervisor (+Travel Coordinator if travel) receive confirmation from FP&M Training
		<p>FPM Training will send confirmation that the request has been approved and registration and payment is complete. Employee works with Travel Coordinator on travel and reimbursements and ensures coverage is coordinated with supervisor.</p> <p>Any reimbursements for meals, mileage, or other expenses incurred must be submitted within 90 days.</p> <p>Molly Lenz molly.lenz@wisc.edu Facilities Planning & Delivery, Sustainability, Office of the Associate Vice Chancellor</p> <p>Nicole Frick nicole.frick@wisc.edu Physical Plant</p> <p>Pat Fargen pat.fargen@wisc.edu Environmental Health & Safety</p> <p>Anne Bogan anne.bogan@wisc.edu Transportation Services</p>

If you travel frequently, review the [UW-Madison Business Services Travel & Reimbursement website](#) and take the Introduction to [UW-Madison’s Managed Travel Program virtual class](#) on the policy and process for arranging and being reimbursed for travel.