



HUMAN RESOURCES PROCEDURE

Exempt Other Employees Tuition Reimbursement

Purpose of Procedure

This procedure exists to administer the Exempt Other Tuition Reimbursement account, which is funded \$6,000 each year by the College. The Tuition Reimbursement Account is used to reimburse Exempt Other employees for tuition and books, provided certain criteria are met.

Date Procedure Originally Documented

May 24, 2006

Person(s) Responsible for Procedure

HR Services Supervisor
HR Services

Location(s) of this Procedure

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Definitions

1. Academic “Session” – refers to the period in which the class runs. Institutions may use different terminology for this period, such as semester, trimester, quarter, section, term, or other
2. Education Plan – is the form that must be submitted by the appropriate deadline each reimbursement cycle. The purpose of this form is to record the employee’s intent to take a class and also to reserve a portion of the reimbursement cycle funds.

Tuition Reimbursement Rules

1. The tuition reimbursement account is funded \$6,000 per fiscal year
2. There are two 6 month reimbursement cycles each fiscal year, each funded with \$3,000.
 - a. The first cycle covers July 1 to December 31
 - b. The second cycle covers January 1 to June 30
 - c. Unused funds at the conclusion of the first cycle will be carried over to the second cycle and will be added to the \$3,000 designated for reimbursement during the second cycle.
 - d. Any unspent tuition reimbursement funds at the end of the fiscal year will be equally divided and deposited into each exempt other employee’s professional development account. An exempt other employee cannot accumulate more than \$1,500 in his her professional development account. Any funds above this \$1,500 individual maximum will be forfeited.
3. Each employee is eligible for up to \$700 in tuition reimbursement per 6 month cycle, not to exceed \$1,400 per fiscal year. If there are more than four employees submitting education plans in a cycle, the \$700 per person amount may need to be reduced to ensure each person receives an equal share (5 employees at \$700 exceeds the \$3,000 total budget). A less than full-time employee will be reimbursed on a prorated basis, based on his/her benefit eligibility



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- factor (which is his/her FTE as recorded in the system) at the time his/her education plan is submitted.
4. Eligible expenses include tuition for classes at an accredited institution and books or other materials required by the class.
 5. Seminars and conferences are not eligible for reimbursement.
 6. Classes must be **completed** within each cycle to be eligible for reimbursement during that cycle.
 7. A minimum grade of “C” (or equivalent) must be achieved to be eligible for reimbursement for the class.
 8. Employees will not be reimbursed for tuition or books that are covered by grants, scholarships or other tuition reimbursement programs.
 9. There is a deadline to submit the Education Plan each cycle (see details in procedure below).
 - a. The first cycle deadline is September 15. Education Plans must be received by Human Resources by 5:00 p.m.
 - b. The second cycle deadline is March 15. Education Plans must be received by Human Resources by 5:00 p.m.
 - c. Those who miss the deadline for a cycle will not be guaranteed any tuition reimbursement and will only be reimbursed for classes after those who submitted Education Plans by the deadline are reimbursed up to their maximum allowance.
 10. If an employee does not enroll or complete the class as intended on his/her Education Plan form, he/she will not be eligible for reimbursement. The money reserved for the employee during the cycle will be made available first to those who submitted their Education Plans by the deadline. After the employees who submitted their Education Plans by the deadline have been reimbursed up to their maximum of \$700 per person amount, those who submitted Education Plans, but missed the deadline, will be reimbursed for classes completed during the cycle.

Tuition Reimbursement Process

1. The employee enrolls and pays for the class. The class must be completed during the cycle (see **rule 2** for cycle information) for the employee to be eligible for reimbursement for that class. If the class ends in a future cycle, the employee must wait to submit the education plan during that cycle.
 2. Exempt other employees submit their Education Plans to Human Resources by 5:00 p.m. on the cycle deadline (September 15 for the first cycle and March 15 for the second cycle), using the Education Plan form. The Education Plan form can be found on the HR website or in attachment A of this procedure. The form requires information about the class or classes the employee is or will be enrolled in during the cycle.
 - a. A new hire starting after the deadline is considered to have missed the deadline for that cycle and will be subject to **rule 8.c** above.
 3. If the employee must change classes or enroll in a different class after he/she has submitted an education plan, he/she must send those changes in writing to the Exempt HR Services Representative.
 4. The employee completes the class prior to the end of the cycle and submits proof of a satisfactory grade and billing information indicating tuition and/or book expenses paid. The proof of grade and billing information must be submitted to the Exempt HR Services Representative within 30 days from the end of the cycle in which the class was completed.
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5. Each employee will be reimbursed up to the full reimbursement amount of \$700 (or prorated amount if less than full-time) for the cycle. This amount may be reduced, dependent on the number of Education Requests submitted by the cycle deadline.
 - a. For example, if 5 people request reimbursement for the cycle, each person will be reimbursed up to \$600 each (5 people x \$600 = \$3,000). Likewise, if 10 people submit requests, each person will receive up to \$300.
 - b. In another example, if 5 people submit reimbursement requests, but one person incurs only \$500 in tuition expenses and the rest each incur over \$700 in expenses, the 4 people with over \$700 in expenses will each receive \$625 in reimbursement and the person with \$500 in tuition expenses will receive \$500.
6. If there are funds remaining after all reimbursements for the first cycle have been made, those funds will be added to the \$3,000 for the second cycle and will increase the amount available during the second cycle for reimbursement.
 - a. For example, \$2,000 is reimbursed after the first cycle, leaving \$1,000 in unspent tuition funds. This \$1,000 is carried over to the second cycle, making the total available for the second cycle \$4,000.
7. If, at fiscal year end, funds remain after all reimbursements have been made, those funds will be equally divided and deposited into each exempt other employee's professional development account.



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Exempt Other Employees Tuition Reimbursement Request and Education Plan Form

Deadlines for Submission

Cycle 1 - September 15

Cycle 2 - March 15

Name: _____ Datatel ID: _____

Course Name: _____ Institution: _____

Course Description: _____

Course Start Date: _____ Course End Date: _____

Tuition Amount: \$ _____ Book Amount: \$ _____ Total Expense: \$ _____

Cycle 1 (July 1 to December 31) Cycle 2 (January 1 to June 30)

Once the class is completed, you must provide proof of completion/grade received and proof of payment from the institution indicating cost of class and/or books. Both items must be submitted *within 30 days* of the end of the cycle to receive reimbursement.

Signature: _____ Date: _____

Human Resources Use Only

Amount Reimbursed: _____ FTE (if prorated): _____

Account Number: 01-33010-26431 DVP Number: _____

Notes:

HR Representative Initials: _____ Date: _____