HUMAN RESOURCES PROCEDURE

Exempt Employees Tuition Reimbursement

Purpose of Procedure

This procedure exists to administer the Exempt Employee Tuition Reimbursement account, which is funded $11,000 each year by the College. The Tuition Reimbursement Account is used to reimburse Exempt employees for tuition and books, provided certain criteria are met.

Date Procedure Originally Documented

May 24, 2006

Date Procedure Revised

June 11, 2009

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 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 $11,000 per fiscal year (with the fund increasing automatically each year based on the Exempt salary schedule increase).
2. There are two 6 month reimbursement cycles each fiscal year, each funded with $5,500.
    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 $5,500 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 employee cannot accumulate more than $3,000 in his/her professional development account. Any funds above the 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 seven 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 (8 employees at $700 exceeds the $5,500 total budget). A less than full-time employee will be reimbursed on a prorated basis, based on his/her benefit eligibility 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 "B" (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. 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.

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 employees submit their Education Plans to Human Resources 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.
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.
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.
    a. For example, if 8 people request reimbursement for the cycle, each person will be reimbursed up to $687.50 each (8 people x $687.50 = $5,500). Likewise, if 10 people submit requests, each person will receive up to $550.
    b. In another example, if 8 people submit reimbursement requests, but one person incurs only $600 in tuition expenses and the rest each incur over $700 in expenses, the 4 people with over $700 in expenses will each receive $700 in reimbursement and the person with $600 in tuition expenses will receive $600.
6. If there are funds remaining after all reimbursements for the first cycle have been made, those funds will be added to the $5,500 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 $3,500 in unspent tuition funds. This $3,500 is carried over to the second cycle, making the total available for the second cycle $8,500.
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 employee's professional development account.

Exempt Employees
Tuition Reimbursement Request and
Education Plan Form

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: _____