

Carleton Life Support Systems - Human Resources Procedure

Subject: Educational Assistance Procedure

Procedure Number: 10.3P

Prepared by J. L. Davis

Approved by V. Kauzlarich

Date: 8/30/05

A. Purpose

Educational Assistance is one of the “Health and Welfare” benefits Life Support provides to all employees. Inasmuch as Educational Assistance is not an entitlement, approvals are required and limitations apply for employees who wish to receive this benefit.

While the HR Department manages this program, tuition expense is paid from departmental budgets. This procedure describes the process for getting approval to participate in the program and for receiving tuition reimbursement.

Educational Assistance is distinguished from training in that training is normally a few days or a few weeks. Requests for training are made through normal management channels and do not require an application process.

B. Application Requirements

1. All CLSS full time employees are eligible to participate in this program.
2. Participation must be approved prior to enrollment for the tuition to be reimbursed.
3. Courses shall be taken outside the participants’ regular scheduled work hours.
4. Courses and degrees must be directly related to the employee’s current position or a position into which the employee might reasonably be assigned or promoted.

C. Applying for the program

Step 1 Obtain an Educational Assistance Application form from the HR Department

Step 2 Complete the application:

- Provide the necessary personal information
- List the institution you plan to attend
- Identify other degrees and certifications earned and any applicable and current college credits.
- Describe how the degree or courses will enhance your current position
- List all the classes that are required to complete the degree

Step 3 Submit the completed plan to your Supervisor or Manager. Your immediate Supervisor and Director must sign the application for approval. Your application will then be forwarded to the HR Director for final approval.

Once your application has been approved, you must submit an Educational Assistance Reimbursement Request EVERY semester (or session) for all courses BEFORE classes begin. This approval is required so that Directors know when tuition reimbursement expenses will hit their budgets.

D. Reimbursement Guidelines

- CLSS will advance the employee 50% of the tuition cost prior to the class start date.*
- Undergraduates must receive a “C” or better and graduate students must receive a “B” or better for courses to be reimbursed.
- The maximum annual reimbursement for Bargaining Unit employees is described in the Collective Bargaining Agreement.
- Tuition reimbursement for Salaried employees will follow the annual IRS exclusion for taxable income. Consult the HR Department for this maximum amount.
- 100 and 200 level courses at community colleges will be reimbursed at 100%.
- 100 and 200 level courses taken at a four-year college will be reimbursed at the community college tuition rate.
- If an employee voluntarily withdraws from a course, the employee will be responsible for the entire cost.
- If a management decision results in an employee having to withdraw from a course, CLSS will pay the entire cost.
- **Reimbursable costs:** includes course tuition, tuition for professional examination preparation course, proficiency (testing out) fees, and lab fees.
- **Non-reimbursable costs:** includes parking fees, student activities, graduation fees, placement examines, books, journals, or other publications.

E. Restrictions and Penalties

- Participants may not be reimbursed for more than 6 credit hours per semester without management approval.
- Students must submit itemized receipts, which verify enrollment to the Training Manager within ten (10) days following registration. Failure to submit these receipts may nullify the application and require the student to refund CLSS for any related reimbursement funds received.
- Students must submit grades to the Training Manager within 45 days of course completion or refund CLSS for any related tuition funds received.
- Students who withdraw from a course or who do not achieve a passing grade must refund CLSS for any related tuition funds received.
- Employees who voluntarily leave CLSS during a semester in which they received tuition reimbursement, will be required to pay the full cost of the course.
- Employees, who voluntarily leave CLSS within two years after receiving a degree under this program, will be obligated to reimburse CLSS for the tuition paid during the last year of the degree program.
- Students withdrawing from a course should notify the Training Manager immediately

* Many, but not all, local colleges direct bill CLSS for tuition expense. For those that do, there is no “out of pocket” expense to the employee.