

## **EMPLOYEE EDUCATIONAL ASSISTANCE PROGRAM**

SOURCE: Office of the Assistant Chancellor for Administrative Affairs

Revised May, 2011

### **Background**

This policy paper outlines the Educational Assistance Program of the University of Wisconsin-Whitewater. It describes fee/tuition reimbursement policies for authorized coursework for credit and training undertaken by the various types of employees at UW-Whitewater. It does not address coursework or training under the faculty or academic staff professional development programs or employer-directed coursework or training including meetings, conferences and workshops, i.e., that training which is paid directly by the employer.

### **Constraints**

In addition to the policies and procedures set forth in this paper, reimbursement for coursework for credit and training is subject to the following rules and regulations:

1. Unclassified Personnel Guidelines #8
2. Internal Revenue Code Section 127
3. Collective Bargaining Agreements
4. General Administrative Policy Paper (GAPP) #25

Any financial aid received by the employee specifically for tuition and fee shall be taken into account when determining the amount of assistance for which the employee may be eligible.

### **Policy**

It is the policy of the University of Wisconsin-Whitewater to promote continuing education of faculty and staff. Employees may be reimbursed for authorized coursework for credit and training within the constraints listed above and within the constraints of allocated budgets. An unclassified employee must have a half-time or greater appointment and a classified employee must have a permanent or project appointment to be eligible for reimbursement. Limited term employees, employees in training and student help are not eligible.

Request for Authorization to Reimburse Employees Fee/Tuition must be completed with all requisite approvals and signatures prior to the commencement of the course(s). The form, "Request for Authorization to Reimburse Employee's Fee/Tuition" may be obtained at <http://www.uww.edu/adminaffairs/hr/forms/tuitionreimbursementrevised.pdf> (sample of form is located on the last page of this policy)

### **Eligible Coursework or Training**

#### **REPRESENTED CLASSIFIED EMPLOYEES**

(Governed by the applicable bargaining agreement)

## *Wisconsin State Employees Union Contract*

### DEFINITION

Career related training and educational activities are those that aid an employee in progressing to any class or class series within the bargaining unit within the agency or for lateral movement to a position in a counterpart pay range within the agency.

NOTE: The agency is the UW System. (11/12/6) (Number refers to contract paragraphs [article/section/sub-section]).

### CREDIT HOUR ENTITLEMENT

Employees shall be allowed to take 15 semester hours during the two-year life of the contract, not to exceed 6 credit hours per semester or 3 credit hours per summer session (11/12/6)

### REIMBURSEMENT RULES

- A. To qualify for reimbursement, employee must be admitted to an educational program in the State Higher Educational System, State Private Accredited Higher Educational System or Area Technical College System. (11/12/6)
- B. Reimbursement rate is 75% of tuition costs and fees upon successful completion of the course(s) and if still employed by the university. (11/12/6)
- C. The employee must seek and receive advance authorization from the supervisor and the appointing authority prior to commencement of any career-related course(s). (11/12/6)

### MISCELLANEOUS

- A. Employee shall be granted time off without pay, including reasonable travel time, to take courses. (11/12/6)
- D. Employer may limit the number of employees in any work unit availing themselves of these provisions at any one time because of operational and program continuity needs. (11/12/6)
- E. Employer may exceed the minimum contractual guarantees. (11/12/8)

## *Professional Education Contract (Library Associates)*

### DEFINITION

Career related educational activities are those which aid an employee in developing, improving, or updating skills or knowledge which the employee needs to move upwardly or laterally within the bargaining unit, including the acquisition of additional certifications. (11/8/1)

### CREDIT HOUR ENTITLEMENT

Employees shall be allowed to take up to 12 credit hours per year. (11/6/1)

### REIMBURSEMENT RULES

- A. Reimbursement rate is 75% of the tuition cost when enrolled in a UW System campus or area technical college, or taking a correspondence course associated with those institutions. (11/6/1)
- B. If enrolled in any other accredited institution of higher education, or enrolled in correspondence courses from accredited Wisconsin higher educational

- institutions, reimbursement will be limited to 75% of the tuition costs at the nearest UW System campus or technical college, whichever is applicable. (11/6/1)
- C. Employees will be reimbursed upon successful completion of the course(s) if still employed by the university. (11/6/1)
  - D. Prior to commencement of any career-related course(s), employee will seek and receive advance authorization from the supervisor and the appointing authority. (11/6/1)

#### MISCELLANEOUS

Employer may exceed these standards (11/7/1)

#### *Professional Patient Care Contract (Nursing Clinicians)*

#### DEFINITION

Career-related education is defined as job related education courses in any institution of higher education in the State of Wisconsin. (13/5/A)

#### CREDIT HOUR ENTITLEMENT

- A. Each employee will be allowed to attend up to a total of 12 credit hours per academic year. (13/5/A)
- B. An academic year is defined as the beginning of the fall semester or quarter through the end of the summer semester or quarter. (13/5/B)

#### REIMBURSEMENT RULES

- A. Reimbursement rate is 100% of the tuition costs, plus fees. (13/5/C)
- B. Reimbursement will be made to the employee upon successful completion of approved courses. (13/5/C)
- C. The employee will request time off and/or reimbursement in advance of course registration in order to obtain approval and arrange for scheduling of hours to meet operational needs. (13/5/D)

#### MISCELLANEOUS

For purposes of operational needs and program continuity, the appointing authority retains the right to limit the number of bargaining unit members in any given work unit availing themselves of these provisions at any given time. This will not be unreasonably applied. (13/5/E)

#### *Professional Science Contract (Medical Technologist)*

#### DEFINITION

Career related courses are those that are related to an employee's current position or those which aid an employee in progressing to any classification in the employee's current classification series or to any classification in a related occupational group within the bargaining unit within the agency. (10/5)

#### CREDIT HOUR ENTITLEMENT

Employees shall be reimbursed for up to 12 credit hours during the term of the contract. (10/5)

## REIMBURSEMENT RULES

- A. Employees who attend career-related courses at accredited higher educational institutions shall be reimbursed 75% of the actual tuition cost, not to exceed 75% of the tuition cost in effect at UW-Madison. (10/5)
- B. Employees will be reimbursed upon successful completion of approved courses, if employed at the time of completion. (10/5)
- C. Prior to commencement of any of these accredited courses, the employee shall receive advance enrollment authorization from the appointing authority (10/5)

## MISCELLANEOUS

Time lost by attendance at career-related educational classes shall be charged to annual leave, personal holiday, compensatory time, or leave without pay as requested by the employee. At the employer's discretion, the employee may be authorized to make up lost work time or to attend without loss of pay. (10/4)

### *Wisconsin Law Enforcement Association (WLEA)*

- I. The rules governing tuition reimbursement for WLEA-represented employees are set forth at Section 10/10/7 (Career-Related Education) of the WLEA Agreement. For 2005-2007 WLEA-represented employees are entitled to take time off without pay to take career-related educational courses up to but not exceeding 15 semester hours (not to exceed six semester hours per semester or three semester hours per summer session) for the duration of this Agreement. Seventy-five percent (75%) of tuition costs and fees will be reimbursed by the Employer, if the employee is still employed upon successful completion of approved courses. Prior to the commencement of any career-related courses, the employee must seek and receive advance authorization from his/her supervisor and from the appointing authority for enrollment in career-related courses. Once approval is given, it may not be rescinded except in case of emergency.
- II. Career-related training and educational activities are those that aid an employee in progressing to any class or class series within the bargaining unit within UW System or for lateral movement to a position in a counterpart pay range within UW System.
- III. The employer may exceed these standards. (10/5)

**UNCLASSIFIED AND NONREPRESENTED CLASSIFIED EMPLOYEES** - (Governed by UW System General Administrative Policy Paper #25)

## DEFINITION

Coursework or training which will improve the employee's job performance will be eligible for reimbursement. This includes acquiring skills and knowledge necessary for advancement to positions closely related to the current job or to advance to another job which is pertinent to the mission of the UW System. Coursework or training undertaken at an employee's initiative for self-enrichment does not qualify.

## CREDIT HOUR ENTITLEMENT

Normally, no more than one course, up to five credits, or a training equivalent in any academic term, may be reimbursed.

## REIMBURSEMENT RULES

- A. Tuition and segregated fees are fully reimbursable.
- A. A Request for Authorization to Reimburse Employee's Fees/Tuition must be completed and approved prior to the commencement of the course.
- B. An employee will be reimbursed only upon successful completion of the course if the employee is still employed at the institution.
- C. A classified employee must have a permanent or project appointment to be eligible for reimbursement.
- D. Reimbursable coursework is that which is taken at any state accredited public or private higher educational institution or VTAE district institution. Normally, reimbursement for coursework taken at private institutions shall be limited to the rate of an equivalent course at the home institution.
- E. Budget constraints may limit the amount of coursework authorized for reimbursement.

## MISCELLANEOUS

Normally, the coursework is taken on an employee's own time.

### **Funding**

The policy for funding course reimbursement is designed to provide consistent treatment for employees regardless of the department's individual budget status or the funding source for the department. The method of accounting for the funding is determined by each division. However, individuals will not be denied reimbursement on the basis of budget limitations.

The following three items must be submitted when requesting reimbursement:

1. A completed Request for Authorization to Reimburse Employee's Fee/Tuition Form (approved prior to enrollment).
2. Evidence of having paid reimbursable fees, a fee receipt.
3. Evidence of successful completion of the coursework or training (grade report or certification of completion).

Requests for reimbursement which do not include all of the above requirements shall be denied.

## APPENDIX A

### UNIVERSITY OF WISCONSIN-WHITEWATER

#### EMPLOYEE EDUCATIONAL ASSISTANCE PROGRAM

#### REQUEST FOR AUTHORIZATION TO REIMBURSE EMPLOYEE'S FEE/TUITION

1. This form should be completed in full prior to enrolling in the course. The request will be returned to the employee after all approvals have been obtained.
2. One form should be completed for each course.
3. Upon completion of the course, submit the original signed request with the grade report and fee payment receipt to Financial Services.

A copy of this form is available at

<http://www.uww.edu/adminaffairs/hr/forms/tuitionreimbursementrevised.pdf>