A OF AUS	HUMAN RESOURCES DEPARTMENT						
	PROCEDURE	Tuition Reimbursement					
	Division	Organizational Development					
	Effective Date	December 14, 2001	Rev No.	1			
POUNDED 112	APPROVAL		Date				
	Title	Director, Human Resources Dept.					

PURPOSE

The Tuition Reimbursement Program promotes the City's goals of improving customer service and investing in the workforce by providing financial assistance to employees who take job-related, City career-enhancing credit courses at accredited, degree-granting schools and institutions. The Tuition Reimbursement Program is not intended to provide assistance for staff development training or continuing professional education.

OVERVIEW

The Tuition Reimbursement Procedure guides employees and department management through the stages of the program:

- 1. Applying for Tuition Reimbursement Benefits
- 2. Determining Employee Eligibility
- 3. Course Eligibility
- 4. Reimbursing Employee
- General Guidelines (p. 4)
- Applying for Tuition Reimbursement Benefits (p.5)
- Approving Tuition Reimbursement Eligibility (p.6)
- Reimbursing the Employee (p.7)
- Form, Tuition Reimbursement Application Form (p.10)
- City of Austin Tuition Reimbursement Fact Sheet (p.11)
- Tuition Reimbursement Calendar (p.12)

APPLIES TO

_All employees	_Temporary employees	x_ Non-Civil Service		
x_Regular full-time classified employees	_Temporary Seasonal employees	x_Civil Service		
x_Regular part-time classified employees	_Temporary On Call employees	x_ Grant funded		
_Probationary employees		x_Executive Employees		
HRD Internal Procedure	· · · · · · · · · · · · · · · · · · ·			
All HRD Staff	Compensation	HRMS		
Administration	Compliance	_Organization Research		
ADA Office	Employee Benefits	Organization Development		
Automation	Employee Relations	Records		
Civil Service	Employment Services	Risk Management		
	Finance			

ROLES AND	RESPONSIBILITIES
Human	Designs overall Tuition Reimbursement Program.
Resources Department	Identifies and appoints a Tuition Reimbursement Program Coordinator.
(HRD)	Administers and implements the Tuition Reimbursement Program.
	Confirms eligibility of employees and courses for tuition reimbursement.
	Provides final approval or denial of all applications for tuition reimbursement.
	• Submits check request for fee reimbursement upon course completion and receipt of required documentation from employee.
Department	• If an Enterprise Department, includes Tuition Reimbursement in annual budget requests.
	• Determines and approves, when possible, flexible scheduling.
Supervisor	• Provides initial approval or denial of employee's request for tuition reimbursement based upon employee eligibility and course eligibility to meet the needs of the department or the City.
Employee	Completes application and forwards to direct supervisor for approval or denial.
	Forwards signed application to HRD Tuition Reimbursement Program Coordinator by specified deadlines.
	 Forwards final grade report and paid fee receipt to HRD Tuition Reimbursement Program Coordinator by specified deadlines.
	• Confirms receipt by HRD Tuition Reimbursement Program Coordinator of application, approval, final grade report, and paid fee receipts.
	Confirms approval of course for reimbursement prior to the start of class.

DEFINITIONS	
Annual Maximum Reimbursement	The amount of benefits available to an employee on a fiscal year basis, as determined in the annual budget.
Eligible Costs	Tuition and required non-refundable fees.
Final Grade Report	A grade report issued by an educational institution that shows the number of hours and the titles of the courses in which the employee was enrolled, the grade and number of credit hours.
Ineligible Costs	• Refundable fees, cost of living expenses, books, equipment, materials, travel, and parking.
	• Eligible costs that are covered by assistance from the Veteran's Administration, scholarships, or other sources that do <u>not</u> require repayment by the employee. The Tuition Reimbursement program applies only to the net cost to the employee after deducting the amount of such outside aid.
Paid Fee Receipt	An itemized receipt issued by an educational institution that shows the total amount of tuition and fees the employee paid.
Probationary Period	A period of six months following initial employment or reemployment, or change from temporary to regular status of an employee into a regular budgeted position, during which an employee is required to demonstrate his/her ability to perform the duties of the position.
Regular Employee	Any employee, including grant-funded, in a regular budgeted position who has completed his or her probationary period with the City.
Tuition Reimbursement Program Coordinator	HRD division and representative staff member(s) assigned to administer the Tuition Reimbursement Program; currently designated as the Organization Development division.
Temporary Employee	Any individual employed to accomplish specific, short-term or seasonal assignments and classified as "temporary", "temporary-seasonal" or "temporary-on call".

I. General guidel	ines
Discretionary Nature of Benefit	• Funds for tuition reimbursement are budgeted in the general fund and in each of the enterprise funds. They are distributed on a first-come-first-served basis depending on fiscal year funding availability.
Benefit Allowance	• Approved tuition costs will be reimbursed based upon the number of hours an employee is budgeted to work at the time the course begins.
	• Regular employees in budgeted positions working at least 30 hours per week are eligible for up to the annual maximum reimbursement of \$2,000 per fiscal year.
	 Regular employees in positions working at least 20 but less than 30 hours per week are eligible for up to 60% (\$1,200) of the annual maximum reimbursement per fiscal year.
Loss of Tuition Reimbursement Benefits	• Employees will not be reimbursed for tuition expenses if, upon course completion, they are no longer employed by the City.
Accommodating Employee Work and Class Schedules	 Courses should be scheduled during non-working hours. If a course is available only during regular working hours, final approval for flexible scheduling will be at the discretion of the Department Director.

	Employees may obtain an Application for Tuitien Deinshams and from the Users - D							
Obtaining an Application Form	Employees may obtain an Application for Tuition Reimbursement from the Human Resources Department:							
	By calling 974-3227							
	By visiting							
	One Texas Center							
	505 Barton Springs Road							
	Suite 600							
	 Downloading the procedure and application form from the HRD intranet site at http://cityspace.ci.austin.tx.us/Departments/Human Resources/Policies & Procedures/Tuition Reimbursement. 							
Completing the	The employee:							
Application Process	completes the application in full and signs it,							
	 forwards it to his/her supervisor for review and approval or denial, and 							
	 forwards the application with the supervisor's approval to the HRD Tuition Reimbursement Program Coordinator. 							
	Applications may be faxed or sent thru inter-office mail to:							
	Fax: 974-3411							
	Inter-office mail: Tuition Reimbursement Program HRD OTC							
	The employee is responsible for confirming that the application has been received by the HRD Tuition Reimbursement Program Coordinator.							
Application Deadlines	Applications for Tuition Reimbursement, with appropriate department approvals, must be received by the HRD Tuition Reimbursement Program Coordinator by the following deadlines:							
	Fall Semester Classes: the last Friday in September							
	Spring Semester Classes: the last Friday in February							
	Summer Semester Classes: the last Friday in June							
	 On-line courses and courses not offered on a semester basis: prior to the start of the course 							
Notification of Changes	• The HRD Tuition Reimbursement Program Coordinator should be notified of any changes to approved classes or number of approved class hours.							
	• Notification should be provided no later than the end of the institution's Add and Drop period.							

III. Approvin	g Tuition Reir	mbursement Eligibility						
Employee	Employees are	e eligible for tuition reimbursement if all of the following criteria are met:						
Eligibility	Employee is employed in a regular-budgeted position.							
	Employee has completed the six-month probationary period before start of class.							
	Employee	Employee works at least 20 hours per week						
	Employee	is not under disciplinary probation or suspension at the time of application.						
Course	Courses are e	ligible for tuition reimbursement if all of the following criteria are met:						
Eligibility	Course is	job-related or will enhance the employee's City career opportunities.						
		offered at a school or institution that is approved by the Texas Education Agency or other recognized board of accreditation.						
	Course is	offered for college credit hours.						
		offered on a for-grade basis. (The employee may elect to take the course "pass/fail" as e course may otherwise be taken for a grade.)						
	Ineligible	If any of the following criteria are met, the course is not eligible for tuition reimbursement.						
	Courses	• Course is required, organized or coordinated by a department for its employees.						
		 Course is part of a conference, seminar, annual meeting, certification exam, or certification course not offered for academic credit on a for-grade basis. 						
Department Approval of	• Supervisor will review the request for Tuition Reimbursement, confirming that employee meets eligibility criteria and that course appears to meet eligibility criteria.							
Application	 If the supervisor approves the employee's participation in the course – including any scheduling issues that are created in attending the class – the supervisor will sign the Application for Tuition Reimbursement, and return it to the employee. 							
	Employee is responsible for forwarding the approved form to the HRD Tuition Reimbursen Program Coordinator.							
	Supervisor Denial of BenefitIf the supervisor does not approve the application, the supervisor will notify the employee in writing within ten working days of receipt of the Application for Tuit Reimbursement.							
	Appeal of Supervisor's	of command using the general grievance procedure.						
	Decision	The decision of the Department Director is final.						
HRD Approval of		Tuition Reimbursement Program Coordinator will confirm that the employee meets the criteria and that the educational institution and course(s) meet the eligibility criteria.						
Application	• The HRD Tuition Reimbursement Program Coordinator will notify the employee in writing of approval of the application within ten working days of receipt.							
	• The employee is responsible for checking with the HRD Tuition Reimbursement Program Coordina to be sure that the application is processed and approval for program benefits has been granted.							

HRD Denial of Benefit	•	If HRD does not approve the application, the HRD Tuition Reimbursement Program Coordinator will notify the employee in writing within ten working days of receipt of the Application for Tuition Reimbursement.
Appeal of HRD Decision	•	If Tuition Reimbursement benefits are denied, the employee may contact the HRD Tuition Reimbursement Program Coordinator for clarification of the decision. If the employee is still dissatisfied with the decisions of the Tuition Reimbursement Program Coordinator they may appeal the decision to the Director of Human Resources whose decision is final.

IV. Reimbursin	ng the Employee					
Documenting Course Completion	Employees must send a copy of the final grade report and paid fee receipt, which shows the number of hours enrolled, title of courses, and total tuition and fees paid, to the HRD Tuition Reimbursement Program Coordinator					
	 Deadlines for submitting grade reports and paid fee receipts to the HRD Tuition Reimbursement Program Coordinator: 					
	Fall Semester Courses 6 weeks following course completion					
	Spring Semester Courses 6 weeks following course completion					
	 Summer Semester Courses no later than September 13th 					
	On-line courses and courses 6 weeks following course completion					
	not offered on a semester					
	schedule					
	Fax copies and scan copies are permitted.					
	 The employee is responsible for ensuring that the documents are received by the HRD Tuition Reimbursement Program Coordinator. 					
Grade	Undergraduate Courses					
Requirements	 Employees must complete each course with at least a grade of "C". 					
	 Employees must complete course with a "pass" if taken "pass/fail". 					
	Graduate Courses					
	 Employees must complete each course with at least a grade of "B". 					
	 Employees must complete course with a "pass" if taken "pass/fail". 					
Benefit Allowance at End of Course	 Approved tuition costs will be reimbursed based upon the number of hours an employee is budgeted to work at the time the course begins. 					
Reimbursing Employee	 Upon review and approval of the final grade report and paid fee receipt and confirmation of continued employee eligibility, the HRD Tuition Reimbursement Program Coordinator will process the request for reimbursement through the Financial Services Department. 					
	Reimbursed costs will be paid to employees by separate check.					
	 Reimbursements will be made according to the lead-time schedule published annually (see Tuition Reimbursement Calendar on page 11). 					
	 Tuition Reimbursement checks will be delivered to the employee's department by the Financial Services Department for distribution to the employee. 					

REFERENCE DOCUMENTS						
Number	Type Title					
Replaced Docu	ments	·				
(none)						
Current Docum	ents					
A, III, B, 3, f	Personnel Policy Tuition Reimbursement					
	Forms: Employee	City of Austin Tuition Reimbursement Fact Sheet				
	Forms: Employee Application for Tuition Reimbursement					
PROCEDURE Review Cycle	ADMINISTRATIO	DN Tuition Reimbursement Procedure annually, prior to the start of each fiscal				
	year.					
Performance Measures						
Authority to Change	The HRD/Organization Development Administration Division may initiate changes to this procedure.					

		TUITION REIMBURSEMENT			Semester 🗆 Fa		□ Fal	II D Spring		
COUNDED 1819	APPL	APPLICATION FORM 2012-2013				3	□ Summer Y		Year	2012-2013
			APPLIC	ANT INF	ORI	MATION				
Nam	ne						Empl ID #			
Departme	ent						Phone	Work		
Division/Addre	SS							Pager		
Tì	tle							Home		
			COUR	SE INFO)RM/	ATION				
Name of Scho	ol, College or U		ls and Drops should be	reported by the	end of th	e institution's AD	D/DROP perio	od		
Course Title				Course	No.	Begins (c	late)	Ends (date)		Credit hours
Total Tui	Total Tuition and Fees \$						Total Hours			
your preser	s course relate to nt job or promote eer enhancement within the City?									
Are you receivi	ng assistance fro	m other s	ources (VA, g	rant, schol	larshi	p, etc.)? [∃Yes □	No		
	If yes, how much?)			Per 🗆 semester 🗆 month 🗆 other:					
l certify	I certify that the information given above is tru				I certify that the employee meets eligibility criteria a department approves the request for reimbursem					ty criteria and the eimbursement.
Employee Signatur	Employee Signature			ate	Supe	ervisor Appro	val, signati	ure		Date
	Human Reso				oartm	ent Use On	ly			
	Application Denied because:		HRD Signature							Date
 Application Denied, because: Probationary/temporary employee Application submitted after deadline School not accredited 		Status	5							
 Course not offered for credit Maximum annual allowance received 		Amount Paid	k						Date	
□ Other:	□ Other: Ap			/						Date

City of Austin Tuition Reimbursement Fact Sheet

Checklist

Complete Tuition Reimbursement application, obtain necessary signatures, and forward to the HRD Tuition Reimbursement Program Coordinator *no later than posted deadline dates for each semester:*

Fall 2012: Friday, September 28, 2012

Spring 2013: Friday, February 22, 2013

Summer 2013: Friday, June 28, 2013

Online Classes and Non-Traditional Semesters: before the first day of class.

NOTE:

- Incomplete applications will not be accepted.
- You are responsible for following up with your department and the HRD Tuition Reimbursement Program Coordinator to confirm that your application has been sent and received.
- The HRD Tuition Reimbursement Program Coordinator will notify you of approval or denial of application within 10 working days of receipt.

Complete the course and submit your fee statement and final grade <u>within six weeks of course</u> <u>completion for the spring and fall semester, and by September 14th for the summer semester</u>. Send to the HRD Tuition Reimbursement Program Coordinator.

- If all requirements are met, the HRD Tuition Reimbursement Program Coordinator will submit a request for payment to Accounts Payable, Financial Services Department.
- Reimbursement will be issued by the Financial Services Department within 3 weeks of receipt of your final grade report and paid fee receipt to the HRD Tuition Reimbursement Program Coordinator.

Mail and Contact Information

Inter-office	HRD
	Attn: Tuition Reimbursement Program Coordinator
U.S. Mail	City of Austin HRD Tuition Reimbursement
	P. O. Box 1088
	Austin, Texas 78767
Hand Carry	One Texas Center
	505 Barton Springs Road, Suite 600
Phone	512-974-3227
Fax	512-974-3411
E-Mail/Scan	joann.nunez@austintexas.gov

Tuition Reimbursement Calendar November 2012 – November 2013

If you submit your final grade report and fee statement to Human Resources Department prior to the date in the left-hand column, your reimbursement will be processed in time for Financial Services Department to issue payment by the date in the right-hand column.

Fee statement and grades to Human Resources by:	Payment issued by Financial Services Department by:
11/09/12	11/30/12
11/23/12	12/14/12
12/07/12	12/28/12
12/21/12	01/11/13
01/04/13	01/25/13
01/18/13	02/08/13
02/01/13	02/22/13
02/15/13	03/08/13
03/01/13	03/22/13
03/15/13	04/05/13
03/29/13	04/19/13
04/12/13	05/03/13
04/26/13	05/17/13
05/10/13	05/31/13
05/24/13	06/14/13
06/07/13	06/28/13
06/21/13	05/12/13
07/05/13	05/26/13
07/19/13	08/09/13
08/02/13	08/23/13
08/16/13	09/06/13
08/30/13	09/20/13
09/13/13	10/04/13
09/27/13	10/18/13
10/11/13	11/01/13
10/25/13	11/15/13

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