




Approved as amended by: Vice-Chancellor
Business & Finance
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EDUCATIONAL ASSISTANCE POLICY HR 14-08-1

PURPOSE

This policy outlines payment assistance for job and career related education. Allocation of funding for job or career related education is discretionary and is not to be considered an entitlement. Decisions will be made in consideration of campus strategic initiatives and institutional needs. Requests for tuition assistance may be denied at any point during the approval process. This policy describes tuition reimbursement policies for authorized coursework for credit and training undertaken by various types of employees at UW-Green Bay. This policy does not address coursework or training under the faculty or academic staff professional development programs covered in Academic Planning Statements [155](#), [156](#), or [157](#). The provisions of this policy apply without regard to the source of funding; that is, to education supported through centrally administered professional development funds as well as support provided at the unit or other levels.

Authority for this policy is derived from the following sources:

- [UW System Administrative Policy 210: Educational Assistance for Faculty & Staff](#)
- [UW System Operational Policy GEN 23: Job Related Coursework and Training](#)
- Internal Revenue Code Section 127
- Wisconsin Department of Revenue Tax Regulations

DEFINITION

“Qualifying education or training” means coursework or training, which enhances skills or provides knowledge that will improve an employee’s job performance; are mandated by law or regulation in order for the employee to retain the job; are directly related to the employee’s current profession; or provide for career development. Courses for personal enrichment do not fit this definition.

POSITION AND COMPENSATION REVIEW COMMITTEE

The [Position and Compensation Review Committee](#) (hereafter referred to as “committee”) is a Chancellor appointed committee responsible for reviewing requests and ensuring the consistent application of policies surrounding titling, compensation and other related pay and benefit programs or actions. All requests for education assistance in accordance with this policy will be approved through the Position and Compensation Review Committee.



POLICY

It is the policy of the University of Wisconsin System to promote continuing education of employees to improve employee job performance. Employees may be reimbursed for authorized education and training within the constraints of Internal Revenue Code Section 127, the Wisconsin Department of Revenue Tax Regulations, and budget constraints.

Job-related course work and training is accomplished through two means:

- The provision of job-related educational assistance in the form of credit or non-credit tuition reimbursement;
- The provision or promotion of training programs related to employee responsibilities.

Employees may not concurrently utilize more than one funding source for eligible job-related course work or training (i.e. an employee cannot be reimbursed both through tuition assistance funds and governance professional development funds for the same course/training).

QUALIFYING EDUCATION, TRAINING & CERTIFICATION

The committee's decision to authorize assistance will be based on the determination that successful completion of the course or training is beneficial to both the University and the employee in terms of increased knowledge, abilities, skills, and work performance. To qualify as reimbursable coursework or training, the activity must result in an academic grade or other formal certification of completion or accomplishment.

Examples of courses, training, and certification deemed to benefit both the University and the employee include:

- those which provide knowledge and skills directly related to maintaining or improving current job skills;
- mandated by law or regulation in order for the employee to retain the job;
- directly related to the profession in which the employee is currently working; and
- provide for career development within the University, including a necessary elective for completion of such degree.

Assistance may be denied in cases where the committee determines that neither the course, training, certification, nor the degree pursued is of sufficient benefit to UW-Green Bay.

A. TUITION ASSISTANCE

Employee Eligibility

Faculty, Limited, Academic and University Staff employees who hold a half-time or greater appointment are eligible to apply for tuition assistance after six-months in the current position and other job related course work and training upon hire. Temporary employees, employees-in-training, and student employees are not eligible. Employees with a terminal degree are not eligible for tuition assistance.

Supported Institutions



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Coursework may be taken at any regionally accredited public higher educational institution. Coursework at UW System institutions is encouraged.

Credit Maximum

Normally, no more than five credits or its training equivalent may be authorized for an employee per term. Terms are defined as Fall, Spring and Summer. The start date of a course will determine which term the course will be part of.

Additional coursework may be authorized by the chancellor or designee. Usually, employees attend courses on their own time. If, however, the class is available only during scheduled work hours, with the supervisor's approval, the employee may request an [Alternative Work Schedule](#) or use paid leave time if departmental operations are not disrupted.

Reimbursement Rates and Source of Funding

Tuition shall be reimbursed only upon successful completion of the course if the employee is still employed at UW-Green Bay. Please see the chart below to determine the level of reimbursement available based upon the education institution chosen.

Institution	Level of Reimbursement Available *
UW-Green Bay	75%
Other UW System Institution	75%
Other Public Institution (i.e. Out-of-state)	50%
Private Institution	0%

* Maximum reimbursement is limited to tuition cost of the equivalent number undergraduate or graduate credits (excluding fees) at UW-Madison, or at the institution selected, whichever is less.

Tuition assistance from the central fund is limited to \$500 per fiscal year. The end date of the course determines to which fiscal year the reimbursement will apply. The dean/division head must identify the amount the division proposes to pay towards cost of the course or education program prior to the commencement of the course or program on the [Tuition Assistance Request](#). Reimbursements funded by the division are at their discretion, subject to the maximum reimbursement limits noted in this policy.

Segregated fees for UW-Green Bay classes are waived. Administrative processing fees, books, supplies and travel costs are not reimbursable. If an employee changes jobs within UW-Green Bay prior to completion of an authorized course, they must notify Human Resources.

Termination of Employment

In the event of a voluntary termination, the employee agrees, by their signature on the [Tuition Assistance Request](#), to repay all tuition assistance reimbursements paid during the 12 months prior to the effective date of termination.

Requesting Advanced Approval for Tuition Assistance



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Employees must complete and submit a [Tuition Assistance Request](#) available on the Human Resources website. A new request form must be submitted prior to each term.

If the employee is pursuing a degree, an outline of the educational program must be submitted prior to initially starting the program. All review and approval must be received prior to beginning a course.

Requesting Reimbursement for Tuition Assistance Expenses

Employees requesting reimbursement for approved tuition assistance must complete and submit a request through the SFS [E-Reimbursement](#) module. When submitting this request, employees must attach a copy of the grade report or notice of successful completion of the course or training, a copy of the tuition/fee payment receipt and the original approved Tuition Assistance Request. All requests for reimbursement will be charged to funding 102-400540-6. Human Resources will review and appropriately split funding depending on approved departmental contribution amounts.

Tuition reimbursement will be deposited into the employee's primary payroll account. Requests for reimbursement which do not include all of the above requirements will not be processed.

B. JOB RELATED COURSEWORK, TRAINING & CERTIFICATIONS

Training deemed to benefit both the University and the employee that provides knowledge and skills directly related to maintaining or improving current job skills, or mandated by law or regulation in order for the employee to retain the job, or deemed essential to the continued effectiveness of an employee is allowable under this policy. Such coursework, training or certification may occur during scheduled working hours and should be paid for directly by the employer.

Divisions may pay for related expenses (i.e. conference registration) by using a department procurement card, as long as prior approval has been obtained by the Budget Authority.

Please be aware, unless clear authority is granted through an applicable collective bargaining agreement, university payment of professional license fees is prohibited, regardless of the source of funds. Payment of license fees to maintain professional credentials is the responsibility of the employee and treated separately than job related coursework, training or certification. For further information please see [UW System OP GEN 25: Payment of Licenses](#).

Note:

The taxability of reimbursements is subject to the existing provisions of Section 127 of the Internal Revenue Code. Employees should be advised to obtain tax counsel as to the reportability and deductibility of educational expense reimbursements. Educational assistance expense reimbursements totaling more than \$5,250 in a calendar year are considered taxable income, will be included on your W-2, and are subject to FICA, Federal, and State tax withholding on your paycheck. (see IRS Publication 970, [Tax Benefits for Education](#), under the section, "Employer-Provided Educational Assistance").