



EMPLOYEE EDUCATIONAL ASSISTANCE PROGRAM

Request for Authorization to Reimburse Employee's Fee/Tuition

Employee Name		Classification/Title	
Social Security Number		Employing Department	
Check one: Unclassified Staff <input type="checkbox"/> Nonrepresented Classified <input type="checkbox"/> Represented Classified <input type="checkbox"/> Please indicate Bargaining Unit Number _____			
Proposed Coursework (Course Title & Number)			
Starting Date of Course _____	No. of Credits:	Proposed course is:	
Ending Date of Course _____	To Be take at:	<input type="checkbox"/> Job Related <input type="checkbox"/> Career Related Undergraduate <input type="checkbox"/> Career Related Graduate	
Costs associated with the course: Fee/Instruction Cost <input style="width: 100px;" type="text"/> Segregated Fee <input style="width: 100px;" type="text"/> Total <input style="width: 100px;" type="text"/> <hr style="border: 1px solid black;"/>		NOTICE: Due to the frequent changes in tax laws regarding tuition reimbursements, the most recent IRS regulations should be consulted regarding potential tax liability.	
How does the proposed course of study relate to the employee's current job assignment/position duties? How will the course-provided knowledge/techniques improve employee's performance and usefulness? 			
Supervisor	Date	<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved (provide statement).	
Account Custodian	Date	<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved (provide statement).	
Percent of Reimbursement	Amount	Funding Source (account name and number)	
Director of Human Resources	Date	<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved	

Clear Form

UNIVERSITY OF WISCONSIN – SUPERIOR

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CONSTRAINTS:

1. This form should not be used for coursework or training under the faculty or academic staff professional development programs.
2. This form should not be used for training including meetings, conferences, workshops or video/audio conferences, which is paid directly by the employer.
3. For represented classified employees, the employer is responsible for a percentage of cost unless the employer requires that the course be taken. Employer directed work, will be reimbursed at 100%. See appropriate bargaining agreement for additional information.

ELIGIBILITY:

1. To qualify for reimbursable coursework or training, the activity must result in a “grade” or other formal certification of completion.
2. Staff member must be at least half time unclassified employee or a permanent classified employee. Limited term employees, employees in training and student help are not eligible.
3. Coursework or training which will improve the employee's job performance will be eligible for reimbursement. Coursework or training taken at an employee's initiative for self-enrichment does not qualify.
4. Normally only one course, up to five credits, or a training equivalent, may be taken in any academic term unless additional courses are approved by the chancellor or designee.
5. Coursework may be taken at any state or private higher educational institution or VTAE district institution. Reimbursement for coursework at a private institution shall be limited to the rate of an equivalent course at a state institution.

PROCEDURE:

1. Complete the form and obtain approval before enrolling for the course.
2. Upon completion of the course, submit the following three items when requesting reimbursement:
 - a. This completed form with attachments.
 - b. Evidence of having paid reimbursable fees, a fee receipt.
 - c. Evidence of successful completion of the coursework or training (grade report or certificate of completion).

Requests for reimbursement that do not include all of the above requirements will be denied.

3. Submit all information to the Accounts Receivables Office, Main208.
- 4.
5. Reimbursement will be made between 7 to 14 days from the date of receipt of properly completed information.

COST:

1. Instructional costs can be reimbursed to the employee. Book and supply costs are not reimbursable.
2. The expense created when reimbursing the employee will be charged to the account designated at the bottom of the form.

TAX LIABILITY:

Employees are advised to obtain tax counsel as to the responsibility and deductibility of educational expense reimbursements.