Department of Human Resources

TUITION REIMBURSEMENT GUIDELINES and INSTRUCTIONS


FROM: Joint Union/County Committee on Education and Tuition

Westchester County continues to fund a Tuition Reimbursement Program for employees covered under C.S.E.A. and other union agreements. The Joint Union/County Committee on Education and Tuition determines which applicants meet all the eligibility guidelines. The committee consists of members from the C.S.E.A., Teamsters and Management. The reimbursement amount depends on the total dollars approved for payment to C.S.E.A. represented employees compared to the total available funds. This same percentage will be used as a guideline for all other eligible County employees.

Purpose of program:
Tuition Reimbursement is a financial assistance program established as an employee benefit, to help current County employees further their education. The program's intent is to expand the employee's knowledge, skills and abilities, and thereby, enhance job performance, value to the organization, and greater job/career opportunities within County Government.

The application to request tuition reimbursement is made available on the Intranet each September, with a designated January filing deadline. The application is used for all courses completed within the specific calendar year, regardless of semester.

Eligibility guidelines may be modified in any given year by the Joint Union/County Committee on Education and Tuition. Below is a previous document to be used only as a guideline in understanding the parameters of the program.

ELIGIBILITY GUIDELINES

To receive tuition reimbursement, you must meet ALL the following guidelines:

Employment:
- Full or part time continuous employment (at least 17-1/2 hours per week) with the County.
- Employed by the County prior to the start, during, and through the completion of the course and at the time checks for reimbursement are issued (usually by 6/30). A duly authorized leave of absence such as
• for child-rearing, maternity, education or leave under the Family Medical Leave Act constitutes employment.

• Employees separated from County employment due to a reduction-in-force ONLY, provided that the applicant started the course(s) to be considered for reimbursement prior to separation.

Courses:

• A course must be completed by 12/31 to be eligible for that calendar year's program. If a course begins in one year and ends in the next year, the reimbursement request must be made in the year the course is completed. You must attach documentation showing beginning & ending dates of course if the course did not begin & end in the same calendar year.

• Courses, academic degrees & educational programs must relate to County business.

• Course must be at least 20 classroom hours to be eligible for reimbursement.

• Information Technology courses taken towards a vendor-approved certificate in a discipline stated as a minimum or special requirement on a County specification (for example, A+, CNE) are eligible. The school must be vendor approved to issue the certificate.

Schools:

• Academic course, degree or educational program must be in an institution of learning recognized or accredited by a State Department of Education. All other courses require pre-approval of the Department of Human Resources.

Grades Required:

• For certificate programs: certificate or written proof of successful completion of each course.

• For undergraduate courses: minimum grade of C (2.0 GPA on a 4.0 scale).

• For graduate courses: minimum grade of C (2.0 GPA on a 4.0 scale).

Ineligible Programs:

• Seminars, workshops, conferences, management development programs; CEU courses.

• Hobby, social and audited courses.

Financial Assistance: (from any source)

ALL APPLICANTS MUST COMPLETE & HAVE THEIR SCHOOL SIGN THE WESTCHESTER COUNTY FINANCIAL ASSISTANCE STATEMENT WHETHER ANY ASSISTANCE WAS RECEIVED OR NOT.

• Individuals receiving financial assistance (i.e., TAP, MAP, SEOG, Pell grants, scholarships,) will be eligible for tuition reimbursement only after financial assistance has been used and deducted from tuition expenses. Remaining tuition costs are then considered under this program.

• Guaranteed loans are not considered financial assistance and are eligible for reimbursement.
Reimbursement Payments:

- As a reimbursement program, only actual payments are eligible for reimbursement. Deferred payment in anticipation of reimbursement is not eligible.
- There is a $7,000 cap on requested reimbursement expenses. All requests over $7,000 are calculated as $7,000.
- Applicants rejected for reimbursement are advised in writing and will have a 10-day appeal process to provide the Committee with a written explanation as to why the denial was incorrect.
- It is anticipated that payments for approved tuition will be made by the following June.
- ONLY TUITION is reimbursable. Excluded are fees, textbooks, supplies, etc.
- Reimbursements above $5,250 are taxable. Federal law (H.R. 1836) permanently extends Section 127 exclusion for employer-provided educational assistance for both undergraduate and graduate-level education up to $5,250 per year. Consult your tax specialist as to eligibility for an income tax deduction.

APPLICATION INSTRUCTIONS

FAILURE TO FOLLOW INSTRUCTIONS WILL CAUSE YOUR DISQUALIFICATION.

DEADLINE  (designated January date) The application and attached documents must be completed, signed, postmarked or received by the Department of Human Resources by the designated filing deadline date as stated on the application. There will be no exceptions to this deadline (see explanation of fall grades below). It is the applicant's obligation to meet the deadline. No written acknowledgments are sent.

SIGNATURE  (on the application) Your signature must be notarized.

DOCUMENTS  The following documents must be attached to the application on the pages provided and submitted by the designated deadline. Missing documentation will cause disqualification.

1. GRADES  The only documents accepted after the January designated filing deadline are fall semester grades, due by the March designated deadline date. An “official” transcript is not required.

2. SCHOOL BILL  Itemized school bill showing the cost of the course(s), how much was paid, and for what items.

3. PROOF OF PAYMENTS  How was your tuition paid? You must submit copies of:
   • cancelled checks (front/back)
   • credit card receipt or statement
   • official cash receipt
• loan agreement, showing written acknowledgement from school of payments received directly from funding source.

4. **FINANCIAL ASSISTANCE STATEMENT** - (attached to application).

All applicants must submit the Westchester County Financial Assistance Statement, completed & signed by school(s) attended in this calendar year, whether financial assistance was received or not.

Submit the completed application and all required documents to:

Westchester Community College  
Tuition Reimbursement Program  
Human Resources Dept., Suite 111  
75 Grasslands Road  
Valhalla, NY 10595

First class mail or hand-delivery is recommended. DO NOT RELY ON INTER-OFFICE MAIL, since there is no guarantee that your application will be received by the designated filing deadline.

It is the applicant's responsibility to assure that the completed application and all supporting documents have been received or postmarked by the designated filing deadline.

The only documents accepted after the January deadline are fall grades, due by designated March deadline.

Questions may be referred to Human Resources through e-mail (humanresources@sunywcc.edu) or by calling 606-6880.

CSEA members can find additional help on the union website: www.csea9200.com.