



DEM Session: Tuition Reimbursement Request Process

Office of the Vice Provost

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Reminders

- Ask Questions!
 - Raise your Hand 
 - Chat
 - Unmute and ask a question
 - Wait for Question Section
 - Ask Ann or Kelly after the meeting

Road Map

- What is Tuition Reimbursement?
 - Definitions of Career-Related vs Job-Related
- What to know before requesting tuition reimbursement
 - Who do I ask?
 - How is it determined?
 - How is it paid and when?
- How to Request Tuition Reimbursement
 - Approval process
 - Documentation
- Course Completion Reimbursement Process
 - Submission process
 - Documentation
 - Submission Deadline
 - Tax information
- Questions, Comments, Curiosities?

What is Tuition Reimbursement?

- Payment for Career-related courses or trainings

Course/Training is Job Related	Course/Training is Career Related
Job-related coursework and training programs are credit and noncredit, undergraduate or graduate level coursework (including doctorate level coursework) or training (including workshops, conferences and seminars) that is required by the employer, by law or regulations to maintain salary, status, current position (if the requirements serve a business purpose of the University), or taken to maintain or improve skills required in the employee's present work.	Career-related coursework and training are credit and non-credit undergraduate or graduate level coursework (including courses necessary for completion of a career-related degree and doctorate level coursework) or training (including workshops, conferences and seminars) which will qualify an employee for development within their current position or for advancement within the profession in which the employee is currently working. Courses for personal enrichment do not apply.
Such training (other than recognized on-the-job training programs) is usually of brief duration and is not recurring or extensive.	The knowledge that the employee will gain from attending such training is not required for their current job. The employee is able to complete their job responsibilities without this knowledge.
Such training is typically completed during paid work time.	The coursework or training may be suggested by the employer or employee but is not required for continued employment.
The knowledge that the employee will gain from attending such training is needed for their job. The employee cannot complete their job responsibilities without this knowledge.	Career-related coursework or training is typically completed outside of paid work time, although use of leave without pay, adjustment of hours or the use of accrued compensatory time or annual leave may be arranged if the employee's supervisor or division determines that the work of the unit will not be impaired as a result of the employee's absence.
	The decision to authorize career-related coursework or training assistance should be based on the determination that successful completion of the coursework or training will be beneficial to both the University and the employee in terms of increased knowledge, abilities and skills.

Tuition Reimbursement differs from Tuition Remission in eligibility requirements and how the tuition gets paid. Only certain positions are eligible for tuition remission and tuition is paid up front by Unit.

What to know before making a tuition reimbursement request

Who do I need to ask?

- Team members should always work with supervisors prior to enrolling in any courses or programs to discuss scheduling conflicts and funding availability.
- Unit approval process*, and HR approval is required **prior** to the start date of the course or program. *Individual units have unique internal approval processes. Please work with your supervisor to determine approval process.
- Please allow 5 business days for HR review and approval of tuition reimbursement requests.

How is my reimbursement determined?

- Internal unit budget
- Maximums are based on UW Madison resident course equivalency. 18 credits per calendar year.
- Grants and scholarships are taken into consideration and must be disclosed.

How is it paid and when?

- The reimbursement is submitted through the e-reimbursement system after the successful completion of the course (a grade of a C or above, or pass/completion mark).
- Requests must be submitted within 90 days of successful completion of the course.

How to request Tuition Reimbursement

Approval process:

- Team members should always work with supervisors prior to enrolling in any courses or programs to discuss scheduling conflicts and funding availability.
- Both unit and HR approval is required **prior** to the start date of the course or program.

Documentation:

- Team members must complete the tuition approval request form.
<https://www.ohr.wisc.edu/docs/EmployeeCourseworkTrainingRequestForm.pdf>
- Page 2 of the form must be completed by your supervisor. Any forms that are not complete may cause a delay in processing the request.

Please allow 5 business days for HR review and approval of tuition reimbursement requests.

How to request Tuition Reimbursement

Documentation:

UNIVERSITY OF WISCONSIN – MADISON Reimbursement Request for Career-Related Coursework or Training

This form is not to be used for training that is required by the employer, or by law or regulations to maintain salary, status, or current position (if the requirements serve a business purpose of the University), or taken to maintain or improve skills required in the employee's present work..

TO BE COMPLETED BY EMPLOYEE:

Employee Name: Employee ID (EMPL ID):

Employee Job/Appointment Title: Appointment Percent: ☐ 100% ☐ Other

Employing Unit: Division, College or School:

Department Name:

Address:

Proposed Course Title(s) and Number(s):

Name of Institution of Higher Education to be attended:

Have you been admitted? ☐ Yes ☐ No

☐ Undergraduate ☐ Graduate ☐ Other (specify):

Semester Offered: ☐ Fall ☐ Spring ☐ Summer Year Offered:

Number of Credits: Total Fees and Tuition to be Requested: \$

List amount(s) of any grants and/or scholarships received to help pay for tuition and fees of this coursework:

What day(s) of the week and time is/are course(s) or training offered? :

Course occurs during work hours: ☐ Yes ☐ No

If yes, how will employee make up worktime?

How to request Tuition Reimbursement

Documentation:

Describe the relationship between the actual course(s) or training listed above and your present position. How will the course(s) or training qualify you for development within your current position or for advancement within the profession in which you are currently working? Stating that a course is required, as part of a degree, is not sufficient justification. Please list how each course or training is career-related. (Attach additional document if more space is needed)

Employee Signature: _____ Date: _____

Submit this form and documentation of tuition/fee amounts to the authorized person in your division for review, completion and approval.

How to request Tuition Reimbursement

Documentation:

TO BE COMPLETED BY DEPARTMENT MANAGER or APPROVING AUTHORITY:

Please Print Your Name:

Please Print Your Title:

Will this course qualify the employee for development within their current position or for advancement within the profession in which the employee is currently working? ☐ Yes ☐ No

If no, stop and return this form to the employee. Tuition reimbursement is not approved.

If yes, the following information is needed:

Fund/Account to be charged:

*Amount Department Commits for Reimbursement:

(Signatures below as required by division policy)

Supervisor: _____ Date: _____

Department Chair: _____ Date: _____

Dean or Director: _____ Date: _____

In accordance with HR Policy Chapter 12.01, this request for career-related tuition reimbursement has been

☐

Approved

☐

Denied for the following reason(s):

Human Resources: _____ Date: _____

Course Completion Reimbursement Process

Submission process:

- Tuition Reimbursement is requested via the e-Reimbursement system <https://businessservices.wisc.edu/travel-reimbursement/getting-reimbursed/>
- Tuition Reimbursements requests are submitted after successful completion of the course.

Required documents:

- The prior approved form, proof of successful completion of course work (typically a grade report or a letter from the registrar) and a receipt for tuition payment must be included when the expense report is submitted to the department's e-Reimbursement approver.

Submission deadline:

- Expense reimbursements must be submitted within **90 days** of:
 - The end date of the course (for tuition or job training expense reimbursements)
- Expense reimbursements sent back to the traveler for correction must be resubmitted within 90 days of being sent back.

Course Completion Reimbursement Process Cont.

Tax withholding information:

- Tuition reimbursements totaling \$5,250 or more in one calendar year (November 1-October 31) will be subject to Federal and State tax withholding and reporting regulations. FICA (Social Security and Medicare), Federal, and State tax will be withheld from the employee's paycheck for taxable educational assistance expense reimbursements totaling \$5,250 or more that the employee receives during the calendar year (See IRS Publication 970, Employer-Provided Educational Assistance). The taxable amount will be included in the employee's wages and reflected on the employee's W-2 Form, in addition to being subject to FICA, Federal, and State tax withholding. Any non-taxable reimbursements will not be included in wages. If employees have questions concerning tax treatment, they should be encouraged to visit the IRS publications mentioned above. For any further questions, please encourage the employee to contact a tax professional.
- Kelly completes an audit of all expense reports to see if the total reimbursement for the qualifying tax period exceed \$5250. In those cases, a 30% estimated withholding line should be included on the expense report to reduce the payment amount and avoid the deduction on your next qualifying paycheck.

Course Completion Reimbursement Process Cont.

Link to tip sheet on how to enter an expense report:

<https://businessservices.wisc.edu/documents/3024-1-creating-and-submitting-an-expense-reimbursement-in-e-reimbursement-procedure/>

Header information:

Description SAA Courses 704, 730, 775

Report [REDACTED] Paid

Employee ID [REDACTED]

Business Purpose Professional Development

Reference Number NONTRAV

Date	Expense Type	Non-Reimbursable	No Receipt	Receipt Required	Payment Type	Transaction Amt Merchant	Exchange Rate Location	Amount
Description			Additional Information					
06/10/2020	Tuition/Training-Career	☐	☐	☒	Personal Funds	4,025.00 USD	1.00000000	4,025.00 USD
Payment to UW-LaCrosse for Student Affairs Administration Course 704, 730, and 775						University of Wisconsin-LaCrosse		
06/10/2020	E-Re Estimated Withholding	☐	☐	☐	Personal Funds	-1,207.50 USD	1.00000000	-1,207.50 USD

Employee Expenses	2,817.50 USD	Non-Reimbursable Expenses	0.00 USD	Amount Due to Supplier	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Amount Due to Employee	2,817.50 USD

Course Completion Reimbursement Process Cont.

Sample Justification:

Summer coursework reimbursement for my credential through the University of Wisconsin-LaCrosse. This summer I was able to complete coursework on leadership and legal issues within higher education. I also completed a 1 credit practicum in which I worked on diversity and inclusion pieces within the Wisconsin Association of Student Financial Aid Administrators and with the greater UW-Madison Scholarship Community.

Required Attachments:

1. Completed approval form signed by employee, supervisor, and HR approval from Ann
2. Transcript showing passing grade
3. Tuition bill that shows amount paid including any scholarship or grants received. *HERF funds do not need to get deducted from request*

Transcript_with_Spring_2021_Grades.pdf	Transcript showing spring 2021 passing grades
_Spring_2021_Tuition_Reimbursement_Approval.pdf	Final Approval Spring 2021 Coursework
_Spring_2021_Bill_UW_LaX.pdf	Spring 2021 Bill with Payment

Questions, Comments, Curiosities?

