

REQUEST FOR APPROVAL OF TRAINING AND TUITION REIMBURSEMENT CLAIM

USE SEPARATE SET OF FORMS FOR EACH CLASS (ATTACH CLASS/COURSE SCHEDULE)

Employee Name: \_\_\_\_\_  
Last First Initial

Address: \_\_\_\_\_  
Street City Zip

Department: \_\_\_\_\_

Position: \_\_\_\_\_

Date of Request: \_\_\_\_\_ School: \_\_\_\_\_

Class Desired: \_\_\_\_\_ Number of Units to be Earned: \_\_\_\_\_

Class Begins: \_\_\_\_\_ Class Ends: \_\_\_\_\_ Academic Degree: \_\_\_\_\_

Est. Tuition Cost: \_\_\_\_\_ Est. Textbook Cost: \_\_\_\_\_ Registration Fee: \_\_\_\_\_ Est. Lab Fee: \_\_\_\_\_

HUMAN RESOURCES OFFICE

Employee #: \_\_\_\_\_

BU: \_\_\_\_\_

DOH: \_\_\_\_\_

Status: \_\_\_\_\_

AUDITOR'S OFFICE

Warrant Number: \_\_\_\_\_

Date of Payment: \_\_\_\_\_

Budget Approval: \_\_\_\_\_

Computation: \_\_\_\_\_

I have read and understand the Tuition Reimbursement Program Policy and I have included a copy of my class/course schedule: \_\_\_\_\_ (employee initials)

This course will be of value to the County because: \_\_\_\_\_

Date Submitted: \_\_\_\_\_

Signature of Employee: \_\_\_\_\_

This course will be of value to the Department because: \_\_\_\_\_

Funds Available in Acct. # \_\_\_\_\_

Date Approved: \_\_\_\_\_

Date Disapproved: \_\_\_\_\_

Signature of Department Head: \_\_\_\_\_

Date Approved: \_\_\_\_\_

Date Disapproved: \_\_\_\_\_

Signature of Human Resources Director: \_\_\_\_\_

Tuition Reimbursement Claim (To Be Completed At End of Class/Course)

I hereby certify that I have successfully completed the course of study described above, and that the attached receipts reflect true allowable costs incurred during such course of study as evidenced by the attached certificate or copy thereof: (Employee must complete this section)

Date: \_\_\_\_\_

Attached paid receipts \_\_\_\_\_

Attached record of grades \_\_\_\_\_

Total Reimbursement Claimed: \_\_\_\_\_

Signature of Employee: \_\_\_\_\_

I hereby certify and attest that the employee above has successfully completed their authorized course of study in accordance with the Tuition Reimbursement Program of Imperial County and that the total reimbursement claimed is valid:

Date: \_\_\_\_\_

Signature of Department Head: \_\_\_\_\_

Date of Approval: \_\_\_\_\_

Approved amount of Reimbursement: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

Signature of Human Resources Director: \_\_\_\_\_

INSTRUCTIONS

Request for approval of training:

- 1) Employee completes all four (4) copies of request form, attaches a copy of class/course schedule prior to the enrollment in the course or prior to making a payment and forwards to his/her Department Head.
a. Department Head either approves or disapproves request.
b. If approved, Department Head completes and forwards all four (4) copies and attachments to the Human Resources Director.
2) Upon approval or disapproval by the Human Resources Director, all four (4) copies and attachments are sent back to the generating department.
a. Employee retains all four (4) copies and back up until he/she has completed the class/course.

Request for reimbursement:

- 1) Upon completion of the class/course employee shall have ninety (90) days to submit a request for reimbursement.
a. Employee certifies that he/she has successfully completed the course of study by signing and dating all four (4) previously held copies, attaching copies of paid receipts, class/course final grade or certificate of completion, all previously submitted back up and requests total amount of reimbursement, then submits to his/her Department Head.
2) Department Head certifies that employee has successfully completed the course of study by signing and dating all four (4) copies, then forwards them along with the back up to the Human Resources Director for final approval.
3) Human Resources Director verifies all the information submitted, signs, dates, and approves total amount of reimbursement.
a. Once approved and signed by Human Resources Director, white, pink and goldenrod copies along with original back up is returned to originating department. Yellow copy and copies of back up are placed in personnel file.
4) Department Head submits white copy with back up to Auditor-Controller to initiate reimbursement payment.

## TUITION REIMBURSEMENT PROGRAM POLICY

The purpose of the County of Imperial's Tuition Reimbursement Program is to encourage employees to continue their education and advance their professional aspirations through education. The objective of the program is to provide financial support to cover eligible expenses for employees seeking a college degree, professional certification, accreditation or license as outlined in this policy.

To be eligible for tuition reimbursement, the college degree, certification, license or accreditation must be directly related to the work of the employee's department and/or position or offer substantial benefit to the County. Exceptions may be made for elective courses that are required to obtain a college degree.

Eligible expenses include tuition, textbooks, registration fees, parking fees and laboratory fees. Conferences, conventions, institutes, seminars or courses eligible under in-service training are not included in the Tuition Reimbursement Program.

Tuition Reimbursement is available for the following:

1. College-level courses towards the acquisition of an Associate degree or higher taken at an accredited institution as defined by the Western Association of Schools and Colleges (WASC) or equivalent out-of-state agency.
2. Courses or academies recognized by a professional association to prepare to take a test to obtain a certification, license or professional designation.
3. College-level courses taken at an accredited institution as defined by the Western Association of Schools and Colleges (WASC) or equivalent out-of-state agency but not taken as part of a degree program will be evaluated on a case-by-case basis.

The amount of the reimbursement will be determined by the employee's corresponding MOU. For the non-represented employees, such amount shall be the maximum amount granted in any MOU.

Course reimbursement is not eligible if funds from other funding sources are available to defray the costs. For the purpose of this policy, student loans are not considered a funding source.

Reimbursement requirements:

1. Only regular, full time employees are eligible to participate. Limited term, extra-help and employees on their initial probationary period are not eligible for this program.
2. Employees must be employed by the County from the beginning through the end of the course.
3. The employee must submit a Tuition Reimbursement application prior to the enrollment in the course or prior to making a payment.
4. The courses must be taken on the employee's own time or upon the department head's approval, the employee may use their vacation or compensatory time.
5. Before requesting reimbursement, the employee must furnish evidence that the employee received credit(s) for the completion of the course. If the course is a non-credit course, the employee must furnish evidence of satisfactory completion of the course.
6. The employee shall have 90 days from the completion of the course to submit a request for reimbursement under this policy. Such request shall also include a receipt indication the amount of all payments.