



Approved as amended by: Chancellor's  
Cabinet

11-22-2023

Date

Michael Alexander, Chancellor

*Original Approval: January 1, 2008*

## 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 UW System Administrative Policies [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:

- [SYS 210: Educational Assistance for Faculty & Staff](#)
- [SYS 1240: 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.

### POLICY

It is the policy of the University of Wisconsin System to promote continuing education of employees to improve job performance and enhance retention and engagement. 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 or certification 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 University'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.

This policy does not apply to attendance at periodic professional meetings and conferences where state and UWS travel guidelines presently accommodate employee travel and registration expenses. To qualify as reimbursable coursework or training, the activity must be graded coursework or result in other formal certification of completion or accomplishment.

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

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

Assistance may be denied in cases where the Area Leader 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 an eligible appointment at UW-Green Bay. Temporary employees, employees-in-training, and student employees are not eligible. Employees with a terminal degree are not eligible for tuition assistance.

### **Supported Institutions**

Coursework may be taken at any regionally accredited public higher educational institution. Coursework taken at private institutions is not reimbursable. Coursework at UW System institutions is encouraged.

### **Credit Maximum**



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Normally, no more than five (5) 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 in writing. Up to six (6) credits of courses per term if pursued as part of a *cohort program* may be authorized without additional approval by the Chancellor or designee (contingent upon submitted documentation to confirm cohort program).

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.

## Approval of Tuition Assistance

The Area Leader (Chancellor or Vice Chancellor) has authority to approve tuition assistance requests for their area which comply with the provisions within this policy.

## Reimbursement Rates and Source of Funding

Tuition shall be reimbursed upon successful completion of the course so long as the employee is still employed at UW-Green Bay and intends to remain in such employment for the reasonable future. Please see the chart below to determine the maximum level of reimbursement possible based upon the educational institution chosen.

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

Tuition assistance from the central fund is limited to \$500 per fiscal year per employee. The end date of the course determines to which fiscal year the reimbursement will apply. On the [Tuition Assistance Request](#), the dean/division head must identify the amount the division proposes to pay towards cost of the course or educational program prior to the commencement of the course or program. Reimbursements funded by the division are at their discretion, subject to approval of the area leader and the maximum reimbursement limits noted in this policy. Area Leaders are responsible for establishing mechanisms which will ensure equitable distribution of opportunity for educational assistance within their division.

Financial aid (i.e. scholarships, grants) received by the employee for tuition and fees shall be taken into account when determining the amount to be reimbursed.

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 separation from a tuition assistance-eligible position at UW-Green Bay, the employee agrees, by submitting the [Tuition Assistance Request](#), to refund all tuition assistance reimbursements paid during the 12 months prior to the effective date of separation.

## Requesting Advanced Approval for Tuition Assistance

Employees must complete and submit a [Tuition Assistance Request](#) prior to the start of each term. In accordance with [SYS 210: Educational Assistance for Faculty & Staff](#), supervisor/leadership review and approval must also be received prior to beginning each course.

Employees must upload an estimate of fees to the request, and the supervisor will provide justification that the program benefits both the University and the employee. If the employee is enrolling in a cohort program (and thereby authorized for up to 6 credits per term), they should upload documentation of that cohort program with each request. If the employee is pursuing a degree program, an outline of the overall educational program must be submitted as part of the first [Tuition Assistance Request](#).

## 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 after completion of the course. 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 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, 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 training or certification should be paid directly by the employer. Divisions may pay for related expenses by using a department procurement card, as long as prior approval has been obtained by the Budget Authority.

These development opportunities, when directed and supported by the employer, may occur during scheduled working hours. Paid job-related training and certifications may be allowed upon hire.

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. The salary established for employees is intended to attract and retain staff based on the education, experience, and special training required to perform the work. For some staff this includes the requirement that they have a professional license to hold a particular position. Payment of license fees to maintain professional credentials is



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the responsibility of the employee and treated separately than job-related training or certification. For further information please see [SYS 1242: 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”).*