

Office of the Chancellor
Pennsylvania State System of Higher Education

Policy Number 2013-404
Employee Tuition Reimbursement for Degree Programs Policy

Approved by: 
Chancellor

Date: 10/4/13

History:

Revised:

Additional History:

Related Policies, Procedures or Standards:

Additional References:

I. Introduction

The continued professional development of employees is critical to the success of the Office of the Chancellor. Training and development opportunities are typically provided through conferences, seminars, individual courses, professional certifications, etc., as supported by the employee's supervisor(s) and related to the job function performed. However, at times, employees are interested in improving/upgrading their skills/knowledge through the pursuit of a degree. Through this policy, employees may apply for reimbursement (in whole or in part) of certain expenses incurred from enrollment in undergraduate and/or graduate credit-bearing programs.

II. Definitions

- A. **Credit-bearing Course:** A course that, if successfully completed, can be applied toward the number of courses required for achieving a degree, diploma, certificate, or other formal award.
- B. **Eligible Employee:** Full-time employees in the nonrepresented (management) levels, with one year of satisfactory service (fully performing/meeting expectations rating) based on their most recent performance evaluation are eligible for tuition reimbursement.
- C. **Eligible Institution:** A regionally accredited higher education institution.
- D. **Eligible Fees:** Tuition and technology fees only.

- E. **Graduate Program:** Any credit-bearing courses or programs offered by a college or university at the post-baccalaureate level, to include graduate certificates, master's degrees, post-master's certificates, and doctoral degrees.
- F. **Reporting Vice Chancellor:** The supervising Vice Chancellor, who also may be the Executive Vice Chancellor, or Chancellor.
- G. **Term:** Fall, spring, summer, or winter.
- H. **Tuition:** Comprises tuition and technology fees as approved by the Board of Governors.
- I. **Undergraduate Program:** Any credit-bearing courses or programs offered by a college or university that might lead to an undergraduate certificate or degree, including associate and baccalaureate degrees.

III. **Guidelines for Reimbursement of Expenses Related to Pursuing an Undergraduate or Graduate Degree Program**

- A. The program must be from an eligible institution.
- B. Employee must receive a grade "C" or above in undergraduate-level courses and a grade "B" or above in graduate-level courses.
- C. The undergraduate or graduate degree program must be approved by the completion of an Employee Request to Pursue a Degree Program form under Policy 2013-404. The program must be work-related or related to the job function performed as determined by the employee's reporting Vice Chancellor, Executive Vice Chancellor, or Chancellor.
 - 1. Prior to receiving reimbursement, an employee must complete an Out-Service Training (OST) Authorization form For Credit-Bearing Tuition Reimbursement which must be approved by the employee's supervisor, reporting Vice Chancellor, Chancellor, and Human Resources. Until approval is received, employees shall assume full responsibility for any monetary commitments made by them.
 - 2. Qualification for reimbursement shall be based on the program, not the course. Tuition and technology fees will be reimbursed for no more than the number of credits required by the program. **Employees are required to submit documentation to Human Resources detailing the number of credits required by the program.**
 - 3. The Office of the Chancellor will consider reimbursement requests only for an individual's **first associate, first bachelor's and/or first master's degree.**
- D. Tuition and technology fees for courses are reimbursed subject to the availability of funds and supervisory approval up to PASSHE's Board-approved in-state tuition rate. **No other fees or travel expenses are reimbursed.**
- E. Courses are reimbursed at the appropriate level: undergraduate and graduate.

- F. **Reimbursement for an employee's tuition shall not exceed six (6) credits per semester or term.**
- G. Employees attending eligible institutions do so on their own time so that course work and classes do not conflict with regular working hours. However, requests for flextime may be made in accordance with the current Policy 2010-401 on Flexible Work Schedules.
- H. Conditions requiring employee repayment of tuition reimbursement monies.
1. As a condition of tuition reimbursement, an employee is expected to remain in the employ of PASSHE for at least one year after attaining the degree, unless the employee is furloughed. **If the employee does not meet this commitment, the tuition reimbursement received within the previous 365 days must be returned to PASSHE.**
 2. If the employee does not receive a grade "C" or above in undergraduate-level courses and a grade "B" or above in graduate-level courses, then he/she waives entitlement to any and all tuition reimbursement. **Employees must provide official grades to Human Resources upon receipt.**
 3. If an employee severs his/her employment with PASSHE or is terminated for performance or disciplinary reasons prior to completion of approved courses, then he/she waives entitlement to any and all tuition reimbursement for the current semester or term. If the employee has received reimbursement, then he/she is required to repay all monies in full.
 4. An employee accepted for tuition reimbursement may withdraw from the program in which he/she is enrolled without prejudice or sanctions imposed by PASSHE, understanding the following:
 - a) If an employee withdraws from a program, he/she waives the right to any reimbursement for tuition and technology fees for courses not completed. If the employee received reimbursement, then he/she is required to repay all monies in full.
- I. The following employees are **ineligible** for tuition reimbursement:
1. Employees in temporary status;
 2. Employees with less than one year of service at the time of registration;
 3. Employees whose overall performance evaluation rating resulted in "needs improvement" or "below expectations;"
 4. Employees who are receiving federal or state grants and scholarships, or tuition assistance through the university they attend that pays 100 percent of their tuition and technology fees; or
 5. Employees in part-time status.
- J. Employee Reimbursement Procedures:
1. Employees have the option of either reimbursement upon successful completion of the course, or they may request reimbursement prior to successful completion of the course with the understanding that 100 percent repayment of tuition monies is required if the course is not satisfactorily completed.

2. Reimbursement is made upon submission of an approved Travel Expense Voucher (TEV) which includes a billing statement from an eligible institution detailing all charges, grants and scholarships, or financial assistance, also indicating the employee has paid in full.

IV. Administration

The Chancellor's decision regarding exceptions to this policy is final. Only the Chancellor or designee may approve exceptions to this policy. Exceptions to this policy may result in additional taxable compensation to the employee.

V. Taxability of Tuition Reimbursement

Tuition reimbursements provided to the employee may be subject to taxation, for which the employee is responsible.

VI. Effective

Fall 2013 semester