



Merit & Professional & Scientific Tuition Reimbursement Program

- Brief Description:** Program that encourages professional and personal development of every eligible non-faculty, non-temporary Merit and Professional & Scientific (P&S) staff member.
- Responsible Office:** University Human Resources / UHR Service Center
- Last Reviewed/Updated:** January 23, 2017
- Applies to:** Merit and Professional & Scientific staff members (Non-faculty, Non-temporary)

INTRODUCTION

The university supports lifelong learning for ISU employees. This program encourages professional and personal development of every eligible non-faculty Merit and Professional & Scientific (P&S) staff member. The following establishes reimbursement for qualified educational expenses and successful completion of undergraduate, graduate and post-graduate courses in accredited colleges or universities through our Tuition Reimbursement Program.

PROGRAM STATEMENT

The Tuition Reimbursement Program (TRP or The Program) helps to defray the cost of tuition up to a maximum of four (4) college credits available for courses offered by Iowa State University (ISU) or another accredited post-secondary institution. The Program is available to all current Iowa State University (ISU) Merit and Professional & Scientific (P&S) staff members upon completion of one (1) year of continuous non-temporary employment prior to the time of course enrollment and if the employee is enrolled in courses that are part of a degree, or will benefit/enhance the staff member's current position at ISU. The ISU staff member's appointment must be at least twenty (20) hours per week (in a benefit eligible position).

DEFINITIONS

Merit	Organized and Non-organized merit classification covered by the AFSCME Collective Bargaining Agreement
Professional & Scientific (P&S)	Classification generally requires the advanced knowledge which is typically gained through the completion of a four-year college degree. Other requirements often include experience, additional education, communication skills, computer knowledge and/or licenses/certifications.
Tuition Reimbursement Program	Program that encourages the development of the Merit and Professional & Scientific staff
University Human Resources	ISU Central Human Resources office that manages the TR Program to eligible staff

1. Eligibility requirements

A staff member's application will be considered only if the Merit or P&S staff member:

- Complete and submit the application to participate in this program located within [AccessPlus](#) by locating the following links: → Employee tab → Tuition Reimburse
- Has completed a minimum of one year of continuous employment in a non-temporary, non-faculty benefit eligible position of at least 20 hours or more per week prior to the submission deadline and remain continuously employed in an eligible Merit or P&S position throughout the term.
- Acknowledge that submission of an application **does not** guarantee reimbursement.
- Acknowledge at the time of submission that **the employee is liable for all** mandatory fees.
- The staff member must be accepted and maintain the same academic standards as any other applicant or student, and must comply with all student rules and regulations.
- Eligible staff have the opportunity to apply for the tuition reimbursement three times each year (fall, spring and summer semesters) and after review may be approved for the reimbursement of up to four credit hours in each semester. Priority is given to those employees taking coursework related to career advancement within the university. Courses do not have to be taken at ISU
- ***If receiving departmental aid, please verify the amount of aid before submitting an application. If the departmental aid is being provided – it is strongly urged that staff members do not submit an application.***

Reimbursement Application Deadlines		
Semester	Acceptance Period	Edit Deadline
Summer 2016	March 7, 2016 - May 13, 2016	July 8, 2016
Fall 2016	June 13, 2016 - August 19, 2016	October 14, 2016
Spring 2017	October 31, 2016 - January 6, 2017	March 3, 2017
Summer 2017	March 6, 2017 - May 12, 2017	July 7, 2017

• You can delete course(s) from your application until the application deadline for the term has passed.
• You can edit or withdraw course(s) from your current application until the drop deadline for the term has passed.
• After the drop deadline, you will not be able to edit or withdraw your application

• Completing an application is not a guarantee of tuition reimbursement
• The applicant is responsible for ensuring that an application has been complete through AccessPlus process by the semester application deadline.
• Applicants must register for the course listed on their application to be considered for tuition reimbursement.
• Applicants will be notified of their application status via email approximately one week after the application deadline.
• Reimbursement for those who qualify will occur approximately one month after the end of the corresponding ISU semester (i.e. Spring = mid June; Fall = beginning of Feb; Summer = mid Sept).

Inquiries regarding details can be directed to email address tuitionreimbursement@iastate.edu or to the Tuition Reimbursement Program, Department of University Human Resources, 3810 Beardshear Hall, 294-4800.

2. Participation requirements

- Reimbursement pertains to tuition cost only (does not include fees) for those that qualify.
- Applications must be submitted during the posted time frame. **(Applications will not be considered after the submission period has closed.)**
- Staff members must apply for admission and register for each course following applicable University Policy.
- Reimbursement is contingent upon the staff member attaining nothing less than the minimum grade accepted by the Program for the credit or confirmation of satisfactory completion of the coursework from the school.
- Coursework must be taken for academic grade credit
 - Must receive a "Satisfactory" result for Satisfactory/Unsatisfactory
 - Pass/Fail **does not** meet minimum grade requirements and does not qualify for the Program.
 - Minimum grade of a C for all undergraduate coursework
 - Minimum of a B for all graduate coursework

- The Program will not exceed reimbursement of 100% of the tuition-only cost with or without other aid assistance – including but not limited to: scholarship aid, GI Funds, departmental assistance/aid or contributions (**excluded: student loans that must be repaid**).
- Eligible staff members interested in participating in this tuition reimbursement program must:
 - Remain a University employee through the end of the course(s) in which they are enrolled
 - submit information related to additional financial assistance from any source (including grants, awards, departmental aid, scholarships, incentives or GI bill) and the dollar amount of that aid to tuitionreimbursement@iastate.edu
 - provide the final grade report and detailed proof of payment for non-ISU coursework. ISU coursework will be pulled into the system from the records of the Registrar Office.
- Course attendance must be completed on the staff members own time and cannot interfere with staff member's ability to carry out regular position responsibilities or assignments.

3. Program guidelines

- Staff members' course of study is to have a relationship to the employee's ISU position duties and/or requirements leading to the development of skills and/or knowledge needed by the institution or another State Agency, unless the employee is pursuing an undergraduate degree.
- By completing the application process, the staff member is agreeing to the terms of the program and that they will be liable to pay for the tuition cost and any fees incurred during the application term should they not meet the requirements. Staff members are required to pay for all institution mandatory fees.
- The regular refund policy of the University applies in the event of withdrawal from a course (see <http://www.registrar.iastate.edu/fees/tuition-adj>)
- It is the staff member's responsibility to ensure their information is correct for Non-ISU coursework listed within the application. If there are course changes, the applicant must report the changes by updating their application prior to the drop/edit deadline.
- External coursework final grade report must match submitted application for the term or reimbursement will be denied.
- Class attendance must be arranged so that it does not interfere with the staff member's ability to carry out regular position responsibilities or assignments. Merit staff may be expected to make up the time missed from work and P&S employees are expected to meet project deadlines.
- Notification
 - Email notification to eligible staff members will occur several times throughout the program according to status updates.
 - Staff members will receive an initial email after successfully submitting their application to the program for each term utilized. Then additional emails are sent notifying status changes and also as reminders of program deadlines.
- Coursework
 - The Program will reimburse four (4) credits per term, once each term (Fall, Spring and Summer) for a total of 12 per year.
 - The four (4) credits may be as a single course or multiple courses.
 - The Program **does not reimburse for short courses** (i.e., continuing education hours), workshops, conferences or **EXAMS ONLY** where grade credit is not provided.
 - Accelerated coursework programs are not considered short courses – degree related courses lasting between two and 10 weeks are eligible.

- Difference between ISU and Non-ISU coursework reimbursement amounts
 - ISU coursework is reimbursed at program tuition rate.
 - NON-ISU coursework is reimbursed at the institutions rate per credit OR ISUs regular in-state tuition rate, whichever is the lesser cost per credit.

4. How to Apply

The Program is administered by University Human Resources (UHR). The program statement and the following conditions will serve to guide in the administration of The Program. Submitting an application for the Tuition Reimbursement program does not enroll anyone in the coursework. Likewise, applying for The Program **does not guarantee** tuition reimbursement.

ISU Alert
Parking Division
Payroll Info
Payroll-Tracytime
Phone/Data Service
Pyrl-TracytimePnch
Third Party Access
Tuition Reimburse
UHR Training
Votes and Surveys
Work Injury
W2
W4 Withholding



- Eligible employees must complete the application submission through [AccessPlus](#) under the **Employee tab** before the advertised deadline. Submissions must be made before 11:59pm the Friday evening before the start of classes at ISU. The application dates are posted on the website AND in [AccessPlus](#) TR link.
- The staff member must register/enroll in their desired coursework at the institution of their choice.
- The program does not reimburse for short courses (i.e., continuing education hours), workshops, conferences or **EXAMS ONLY** where grade credit is not provided. Accelerated coursework programs are not considered short courses.
- By completing the application submission, the staff member is agreeing that they will be liable to pay for the tuition cost and any fees incurred during the application term should they not meet the requirements.
- It is the responsibility of the staff member to ensure the information recorded for Non-ISU (External) coursework is correct and up to date within the application before the edit/drop deadline.
- ***The program does not provide funding for courses determined to be a requirement of the Merit or P&S staff member's current University position and the employing department is responsible for funding the tuition and any additional costs of study associated with such.***

Tuition Reimbursement Application Status Definitions (indicating process stage):

Submitted	During the 10-week application submission period
Pending	Day after submission deadline
Review	Status will change after the deadline date has passed for editing or dropping coursework.
Withdrawn	Status if application(s) are withdrawn before reaching end of the semester.
Approved/Denied	Grades are loaded into AccessPlus for ISU coursework as they become available. Once verified the status will change to Approved or Denied.
Paid	Status will display once the information is transmitted to Accounts Receivable for processing and disbursement (Amount column will also contain \$ to be disbursed).

Base	Credits	ISU	Status	Requested	Amount	Award
P	0.0	Y	Withdrawn	0.00	0.00	
P	3.0	Y	Paid	888.00	1,629.00	
P	4.0	Y	Paid	1,184.00	1,884.00	*
P	4.0	N	Review	1,808.00	0.00	
P	4.0	Y	Denied	1,184.00	0.00	*
P	0.0	Y	Denied	0.00	0.00	*
P	3.0	N	Paid	888.00	900.00	
H	4.0	N	Paid	882.00	588.00	

5. Disqualifications

- Staff members must remain in a benefit eligible Merit or P&S position. If the employment status would change to an ineligible type or terminate – the applicant is disqualified and would remain liable for the outstanding costs/fees incurred and would not receive the reimbursement.
- Staff members that would withdraw from the coursework prior to the end of the term are disqualified, and are still required to pay the outstanding tuition and fees associated with the term and classes as required by that institution's policy
- External coursework final grade report must match the application at the end of the term or reimbursement will be denied.
- Staff members that are on leave of absence without pay are not eligible to receive tuition reimbursement benefits during the leave.

6. Reimbursement Process

- ISU coursework will be obtained from the Office of the Registrar automatically, once verified – the “Status” will be changed to “Approved” and the request to process is sent to the Accounts Receivable office and will then be electronically disbursed by direct deposit.
- Non-ISU coursework grade report (displaying institution attended, employee name, term, course name, number of credits and grade result) must be sent to:

University Human Resources – UHR Service Center
c/o Connie Sabin
3810 Beardshear Hall
515 Morrill Road
Ames, IA 50011-2103

- A detailed receipt for non-ISU coursework showing the separate cost of tuition and fees for the term.
- The Tuition Reimbursement Program will reimburse ISU coursework at the enrolled program rate.
- Non-ISU coursework will be reimbursed at a rate that will not exceed the rate set by Iowa State University's resident undergraduate or graduate amounts as outlined in the tuition rate schedule for that term. The rates may be found at: <http://www.registrar.iastate.edu/fees/>
- If a staff member receives an **Incomplete** grade, they have 1 year from the start of the term to complete the coursework and receive a grade for that term.
 - They must notify UHR of this completion, provide documentation showing it was completed and the cost and grade received before the 1 year has expired.
 - Failure to do so will result in disqualification and submitted application for prior term will be denied

7. Tuition reimbursement is considered taxable income

- Tuition Reimbursement/Aid will not be subject to tax withholdings if below the annual IRS limits (\$5250).
- In general, you do not have to pay income tax on Tuition Reimbursement benefits for undergraduate degree programs for yourself.
- Under IRS regulations, up to \$5,250 per year of graduate Tuition Reimbursement benefits for employees are non-taxable. This means the first \$5,250 of your graduate tuition costs will not be taxed. Anything over \$5,250 will be considered taxable income, and the tax on the value of the benefit will be withheld from your paycheck.
- Reimbursements/Aid (other than Financial Aid – student loans) above this limit will be treated as taxable income and will be reported on the staff members W-2 (box 1).