

The University of Wisconsin System UW System Administration Procedure



Title: Implementation of SYS 210- Educational Assistance for Faculty and Staff for UWSA

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Last Revision Date: NA

1. Purpose of Procedures

The purpose of this procedure is to establish the guidelines for filing an application, the administrative review of applications and the awarding of educational assistance benefits for UWSA employees pursuant to [UW System Administrative Policy 210- Educational Assistance for Faculty & Staff](#)). This procedure does not apply to employer-directed coursework or training, approved coursework or training under faculty professional development programs, or other employer-directed coursework or training.

2. Responsible UW System Officer

Chief Human Resource Officer and Associate Vice President

3. Definitions

Job related education: Credit and noncredit, undergraduate or graduate level noncredit or training that is required by the University, 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.

Career related education: Undergraduate and graduate level courses and professional development courses which will qualify an employee for advancement within the UW System or Wisconsin State Government. Courses for personal enrichment do not qualify.

4. Procedures

Educational Assistance funding for UWSA employees, for job related education or career related education, shall be centrally administered by the UWSA Office of Human Resources. Funding decisions for particular coursework or training will be based on the determination that the successful completion of the course will be beneficial to both the University and the employee in terms of increased knowledge, abilities, and skills. Funding decisions are made on a course-by-course basis. Any award issued under this policy is not a guarantee of future awards. Award decisions for individual courses are made on the decision date for the relevant semester. At the discretion of the decision-making body, approval for requests covering up to two consecutive semesters may be granted on a single application.

A. Application

- I. Applicants for Employee Educational Assistance must complete the UWS [Request for Authorization to Reimburse Employee's Fees/Tuition Form](#). The form must be submitted to UWSA-HR at uwshr@uwsa.edu no later than August 15th for courses being offered during the upcoming fall semester, no later than December 15th for courses being offered during the upcoming winterim or spring

- semester, and no later than May 15th for courses being offered in the upcoming summer semester.
- II. Applicants may amend or supplement an application at any point prior to the administrative review and determination date. Amendments or supplements should be submitted to UWSA-HR at uwshr@uwsa.edu.
 - III. For education assistance funding awarded by UW System Administration to employees of UW System Administration, only applications for courses offered by a University of Wisconsin System institution or a Wisconsin Technical College System institution will be considered for funding.
 - IV. Applications must be reviewed and approved by the applicant's direct supervisor and the appropriate associate vice president prior to submission to UWSA-HR.
 - i. By approving an applicant's application, the supervisor and associate vice president affirm that they believe the application should be approved based on the criteria in procedure sections 4(B)(III)(i), (ii), (iii), (iv) and (vi), below.
 - V. As per the limitation in UW System Administrative Policy 210(6)(C)(III)(1), generally, no more than one course, up to five credits, or a training equivalent in any academic term (e.g., a semester, summer session, or an equivalent) should be reimbursed. Additional coursework, however, may be authorized by the system president.
- B. Administrative Review
- I. Applications will be evaluated no later than 10 business days after the deadline date for submission.
 - II. Applications will be evaluated by the UWSA Office of Human Resources (UWSHR).
 - III. Evaluation Criteria
 - i. Value of the course content to the operations of the UW System Administration.
 - ii. Value of the course content to the employee's professional development. (i.e. Is this part of an approved professional development plan?)
 - iii. Whether the course is required by law or regulation in order for the employee to retain their job.
 - iv. The location and meeting schedule for the course and its impact on the employee's ability to fulfill their job duties. Additionally, the cost and impact of any job coverage that would need to be provided to enable the employee to complete the course.
 - v. The cost of the course and the budget available for employee educational assistance, as determined by the Office of Finance and Administration.
 - vi. The employee's longevity and job performance.
 - vii. The amount of educational assistance the employee has previously received under this program, or other UW System professional development funding sources.
- C. Notification of Decision
- I. Applicants will be notified of the decision of UWSHR within 2 business days of the office reaching a determination.
 - II. Notification will include whether or not the request is approved, and the maximum amount that has been approved for reimbursement following the successful completion of the course. Decisions are not subject to appeal. The actual amount reimbursed may be less than the maximum amount authorized,

depending on the amount of any non-loan financial aid received by the employee for tuition and fees. The amount of reimbursement shall not exceed the amount paid by the employee, out-of-pocket or through student loans, for tuition and fees.

- D. Repayment of Award Upon Early Separation
 - I. By applying for and accepting educational assistance funding under this policy, an employee represents that they intend to continue their employment with the University of Wisconsin System or Wisconsin State government for at least one year following the date of the award.
 - II. If an employee voluntarily ends their employment with the University of Wisconsin System or Wisconsin State government less than one year following the date of an award under this policy, the amount of any awards issued less than one year prior to the date of separation shall be repaid by the employee to the University of Wisconsin System.
 - III. The University of Wisconsin System may deduct any amount owed under this provision from an employee's paycheck and/or the value of any accumulated leave credit for which the employee would be entitled to a payout upon separation. If the amounts so deducted are insufficient to cover the value of the award(s) granted, the UW System may pursue other collection efforts, at its sole discretion.
- E. Submission of Reimbursement Paperwork
 - I. The following materials should be submitted to UWSA-HR within 30 days of course completion, unless an extension is granted by UWSA-HR:
 - i. A copy of the approved Request for Authorization to Reimburse Employee's Fees/Tuition Form (approved prior to beginning of classes).
 - ii. A fee/tuition receipt or other satisfactory evidence of having paid reimbursable fees/tuition.
 - iii. Evidence of successful completion of the coursework or training (grade report or certification of completion, etc).
 - iv. Documentation of any non-loan student financial aid received by the employee for the reimbursable course.
 - II. Upon distribution of the reimbursement, the employee may be notified of any potential tax impacts of the award.

5. Related Documents

[UW System Administrative Policy 210- Educational Assistance for Faculty & Staff](#)
[IRS Publication 970, Tax Benefits for Education](#)
[Internal Revenue Code Section 127](#)

6. History

Reviewed Academic Staff Committee, 06/05/2023

Reviewed University Staff Council, 06/05/2023

Reviewed and approved by President and VP, Finance and Administration, 7/14/2023

Initially approved by the President, 7/14/23