

Instructions for Employee Educational Assistance Program:

**Request for Authorization to Reimburse Employee's Fee/Tuition**

**Step One: Submit Request Form**

- This benefit is available to faculty or academic staff with a half-time or greater appointment and university staff with a permanent appointment or a project appointment. Temporary employees and student assistants are not eligible.
- You may request reimbursement for one course (up to 5 credits) per semester.
- UWSA only reimburses fees and tuition for courses provided by a UW System institution or a WI Technical College System institution.
- Due dates for the application form are: August 15<sup>th</sup> for fall semester courses, December 15<sup>th</sup> for winterim or spring semester courses, May 15<sup>th</sup> for summer session courses. These are the dates the form is due to UWS HR.
- Prior to submitting the form to UWS HR, the application must be signed by the employee, the employee's supervisor, and the appropriate vice president.
- Employees will be notified of the decision on their application no later than 12 business days after the due date.

**Step Two: Submit Reimbursement Paperwork**

- Successful completion of the course is required for reimbursement.
- Within 30 days of course completion, submit the following documents to UWS-HR: 1) a copy of the approved authorization form, 2) a fee/tuition receipt or other evidence of having paid reimbursable fees/tuition, 3) evidence of successful completion of the coursework (e.g. grade report or certification of completion), 4) documentation of any non-loan student financial aid received by the employee for the reimbursable course.
- Note- if you voluntarily end your employment with the UW System or Wisconsin State government less than 1 year after the date of an award under this policy, you will be required to repay the amount of the award to the UW System.
- Upon distribution of the reimbursement, you will be notified of any potential tax impacts of the award.



**EMPLOYEE EDUCATIONAL ASSISTANCE PROGRAM**

**REQUEST FOR AUTHORIZATION TO REIMBURSE EMPLOYEE'S FEE/TUITION**

<b>Employee Name</b>		<b>Title</b>
<b>Employee ID</b>		<b>Employing Department</b>
<b>Proposed Coursework (Course Title &amp; Number)</b>		
<b>Starting Date for Course</b> _____ <b>Ending Date For Course</b> _____	<b>No. of Credits</b>	<b>To be taken at:</b>
<b>Costs associated with the course:</b> (a) <b>Fee/Instruction Cost</b> _____ (b) <b>Segregated Fee</b> _____ <p style="text-align: center;"><b>Total</b></p> _____		<b>Proposed course is:</b>  <input type="checkbox"/> <b>Job Related</b>  <input type="checkbox"/> <b>Career Related Undergraduate</b>  <input type="checkbox"/> <b>Career Related Graduate</b>
<b>NOTICE:</b> Due to the frequent changes in tax laws regarding tuition reimbursements, the most recent IRS regulations should be consulted regarding potential tax liability. Educational expenses reportable by the University as income to the employee may result in tax withholding on employee paychecks.		
<b>How does the proposed course of study relate to the employee's current job assignment/position duties? How will the course-provided knowledge/techniques improve employee's performance and usefulness?</b>		
By submitting this application, employee acknowledges that any educational assistance award received by the employee must be repaid to the UW System in the event that the applicant voluntarily terminates their employment with the UW System within one year of the date the award is granted.		
<b>Employee Signature</b>		<b>Date</b>
<b>I have reviewed the supporting documentation and recommend reimbursement.</b>		
<b>Supervisor</b>	<b>Date</b>	<b>If disapproved, state reason.</b>
<b>VP</b>	<b>Date</b>	
<b>UWSHR</b>	<b>Date</b>	
<b>Percent of Reimbursement</b>	<b>Amount</b>	<b>Funding Source (Coding)</b>

**Completed form should be submitted to [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu).**