

EDUCATIONAL ASSISTANCE PROGRAM REQUEST INSTRUCTIONS

Washington College's Educational Assistance Program is designed to help pay educational costs for staff who want to improve job skills and knowledge related to their present job as well as prepare for future advancement.

Eligibility: This benefit is only available to full-time benefit-eligible employees. Part-time or temporary employees are not eligible for this benefit. Full-time Employees: At the time of employment Washington College may assist in paying educational costs for approved outside educational courses for regular full-time exempt and non-exempt staff. This policy applies to regular full-time exempt and non-exempt staff. Please note: Policies governing Faculty Development appear in the Faculty Handbook.

Qualifications: To qualify for a subsidy under the Educational Assistance Program, the following conditions must be met:

1. Requests for benefits must be made prior to enrollment in the course, by the deadline of June 1st.
2. The course must be conducted by a recognized nonprofit college or university, or by an educational institution accredited by nationally recognized agencies or associations (under certain circumstances, this may include correspondence courses, trade, or technical courses).
3. The course must have a direct bearing on the employee's work for the College and be closely related to the employee's future job goals. Courses that have a direct bearing on an employee's current work will receive priority over future job goals.
4. The employee must complete the course with a B or better, or the equivalent grade. Transcripts must be submitted as proof of satisfactory course completion. If the employee does not pass the course, they must repay the College for the course and all related costs.

Limitations and Exclusions

1. Participation in the program is entirely voluntary and subject to availability of college funds.
2. Each employee may choose which course they would like to enroll in. The course must be related to the employee's present or future job goals with Washington College.
3. Washington College will subsidize 75% of the employee's actual cost (that is, the total tuition, registration fees, required text books and laboratory fees, less any payments received by the employee from assistantships, scholarships, veterans' educational benefits, etc.).
4. Washington College's expense is limited to \$1,000 per employee in any fiscal year. The maximum amount will be periodically reviewed as tuition and related costs increase.
5. This program does not apply if the employee's attendance at an outside educational course is at the College's request. In such cases, costs are either billed to or prepaid by the College, which pays the full amount.
6. Presently educational assistance subsidies are not taxable income as long as the course is clearly related to the current position. An example would be if the course is needed to maintain or improve skills in the current position. Educational Assistance is an area of the tax laws that have been modified, and employees should be aware that the present treatment may change in the future.
7. If the employee leaves the College before completing the course, the employee must repay the College for the course and all related costs. In addition, if the employee leaves the College within one year of completion of the course, the College will be reimbursed for the course and related costs in full.

Application and Payment Procedures

1. Complete the Education Assistance Program Application (PDF).
2. Requests for Educational Assistance must be approved by the supervisor, department head, and the Director of Human Resources prior to enrolling in the course. Requests for Tuition Assistance must be submitted to the Office of Human Resources by June 1st of the fiscal year it is to be effective. For example, an employee requesting funds for FY2015 would need to submit the application by June 1st, 2014.
3. After requests are reviewed, a copy of the request with approval or denial will be sent to the requesting employee.
4. If approved, reimbursement forms will be sent to the applicant. Applicant must submit an invoice or bill and requisition outlining the course costs to and a requisition outlining additional expenses (books, fees) to the Office of Human Resources. Human Resources will request that a check be issued payable to the institution where the employee is taking the course for tuition costs, and that a check be issued payable to the applicant for additional expenses.

EDUCATIONAL ASSISTANCE PROGRAM REQUEST FORM

A. EMPLOYEE INFORMATION

If current WC Employee provide WC ID number: _____

Name of Employee: **Proper Name Required**

First Name Middle Last Name Suffix

Employee Job Title: _____ Date of Hire: _____

B. COURSE INFORMATION

Name of Institution/School: _____

Institution/School Address: _____

Street Address or P.O. Box

City State Zip

Term: Fall Spring Summer Academic Year: _____

Start Date: _____ Date of Expected Completion: _____

Course Number: _____ Course Title: _____

Course Number: _____ Course Title: _____

Course Number: _____ Course Title: _____

Explain how course(s) relate to present job or future goals (attach a separate sheet if necessary):

C. COURSE REIMBURSEMENT *Subject to budget availability*

1. Course Tuition: \$ _____

2. Course Books, Fees and Related Expenses: \$ _____

3. Total Educational Assistance Request: \$ _____

4. Total from line 3. Multiplied by .75 :
 (Maximum of \$1000/Fiscal Year) \$ _____

D. AUTHORIZATION SIGNATURES

Applicant: _____ Date: _____

Department Head or Director: _____ Date: _____

E. APPROVALS

Director of Human Resources: _____ Date: _____

Total Educational Assistance Approved: \$ _____

Rationale: _____

