

Department of Human Resources

**TUITION REIMBURSEMENT
2017 GUIDELINES, INSTRUCTIONS & APPLICATION**

TO: Westchester County C.S.E.A.,
C.O.B.A., S.O.A., Teamsters,
Management & Confidential Employees

August 2017

FROM: Joint Union/County Committee on Education and Tuition
Dept. of Human Resources, Suite 100, Michaelian Office Building

SINCE THE INTENT OF THIS PROGRAM IS TO REIMBURSE ALL QUALIFIED APPLICANTS, PLEASE READ INSTRUCTIONS CAREFULLY. IF YOU FAIL TO COMPLETE THE APPLICATION AS SPECIFIED, YOU WILL NOT RECEIVE TUITION REIMBURSEMENT.

Westchester County continues to fund a Tuition Reimbursement Program for employees covered under C.S.E.A., other union agreements, and other eligible County employees. The Joint Union/County Committee on Education and Tuition determines which applicants meet all the eligibility guidelines. The committee consists of members from the C.S.E.A., Teamsters and Management.

The reimbursement amount depends on the total dollars approved for payment to C.S.E.A.-represented employees compared to the total available funds. This same percentage will be used as a guideline for all other eligible County employees.

Purpose of program:

Tuition Reimbursement is a financial assistance program established as an employee benefit, to help current County employees further their education. The program's intent is to expand the employee's knowledge, skills and abilities, and thereby, enhance job performance, value to the organization, and access to job/career opportunities within County Government.

This 13-page document can be downloaded through the County Intranet

2017 ELIGIBILITY GUIDELINES

To receive tuition reimbursement, you must meet ALL the following guidelines:

Employment:

- Full or part time continuous employment with the County (working at least 17-1/2 hours per week and receiving benefits).
- Employed by the County prior to the start, during, and through the completion of the course and at the time checks for reimbursement are issued (usually by 6/30). A duly authorized leave of absence such as for child-rearing, maternity, education or leave under the Family Medical Leave Act constitutes employment.
- Employees separated from County employment due to lay-off ONLY, provided that the applicant started the course(s) to be considered for reimbursement prior to separation. In this situation, you will have received a lay-off letter from the Human Resources Department. Please attach that letter to your application.

Courses:

- A course must be completed by 12/31/17 to be eligible for the 2017 program. If a course begins in 2017 and ends in 2018, the reimbursement request must be made for the year the course is completed. If a course began in 2016 and ended in 2017, you must attach documentation showing beginning & ending dates of course.
- Courses, academic degrees & educational programs must relate to Westchester County Government business (This does not include, for instance, business conducted within local jurisdictions, Westchester Medical Center, school districts, etc.). The Committee reserves the right to use its discretion to deny requests for courses not deemed appropriate. It is advisable to attach a County job specification to support your request.
- Course must be at least 20 classroom hours to be eligible for reimbursement.
- Information Technology courses taken towards a vendor-approved certificate in a discipline stated as a minimum or special requirement on a County specification (for example, A+, CNE) are eligible. The school must be vendor approved to issue the certificate.

Schools:

- Academic course, degree or educational program must be in an institution of learning recognized or accredited by a State Department of Education.

Grades Required:

- For certificate programs: certificate or written proof of successful completion of each course
- For undergraduate courses: minimum grade of C (2.0 GPA on a 4.0 scale)
- For graduate courses: minimum grade of C (2.0 GPA on a 4.0 scale)

Ineligible Programs:

- Seminars, workshops, conferences, management development programs; CEU courses.
- Hobby, social and audited courses.

Financial Assistance: (from any source)

ALL APPLICANTS MUST COMPLETE & HAVE THEIR SCHOOL SIGN THE WESTCHESTER COUNTY FINANCIAL ASSISTANCE STATEMENT WHETHER ANY ASSISTANCE WAS RECEIVED OR NOT. (see page 8A of application)

- Individuals receiving financial assistance (i.e., TAP, MAP, SEOG, Pell grants, and scholarships *exclusive* of book awards of \$300 or less) will be eligible for tuition reimbursement only after financial assistance has been used and deducted from tuition expenses. Remaining tuition costs are then considered under this program. If a book award in excess of \$300 is received, please submit receipts documenting purchase of books.
- Guaranteed loans are not considered financial assistance and are eligible for reimbursement.

Reimbursement Payments:

- As a reimbursement program, only actual payments are eligible for reimbursement. Deferred payment in anticipation of reimbursement is not eligible.
- There is currently a \$10,000 cap on requested reimbursement expenses. All requests over \$10,000 are calculated as \$10,000.
- Applicants rejected for reimbursement are advised in writing and will have a 10-day appeal process to provide the Committee with a written explanation as to why the denial was incorrect.
- It is anticipated that payments for approved 2017 tuition will be made in June 2018.
- **ONLY TUITION is reimbursable.** Excluded are fees, textbooks, supplies, etc.
- At the time of this writing, under current federal law, reimbursements above \$5,250 are taxable. Consult your tax specialist as to eligibility for an income tax deduction.

APPLICATION INSTRUCTIONS

READ CAREFULLY

YOU WILL NOT RECEIVE REIMBURSEMENT IF YOU FAIL TO COMPLETE THE APPLICATION AS DETAILED.

DEADLINE Monday, January 8, 2018.

The application and attached documents must be completed, signed, postmarked or received by the Department of Human Resources by January 8, 2018. There will be no exceptions to this deadline (see explanation of fall grades below). It is the applicant's obligation to meet the deadline. It is strongly recommended that you e-mail Paula Nisbett at par3@westchestergov.com prior to the deadline to request a receipt. A receipt does NOT suggest that your application is complete or approved.

SIGNATURE (page 4A of the application) Your signature must be notarized.

DOCUMENTS The following documents must be attached to the application on the pages provided and submitted by the deadline. **You will not receive reimbursement if documentation is missing.**

1. **GRADES** (page 5A of application) The only documents accepted after the 1/8/18 deadline are the **fall semester grades, due by March 5, 2018.** An "official" transcript is not required.
2. **SCHOOL BILL** (page 6A of application) Itemized school bill showing the cost of the course(s), how much was paid, and for what items.
3. **PROOF OF PAYMENTS** (page 7A of application) How was your tuition paid?
You must submit copies of your payment, including:
 - cancelled checks (front/back)
 - credit card receipt or statement
 - official cash receipt
 - loan agreement, showing written acknowledgement from school of payments received directly from funding source.
4. **FINANCIAL ASSISTANCE STATEMENT** - (page 8A of application).

All applicants must submit the Westchester County Financial Assistance Statement, completed & signed by school(s) attended in 2017, *whether financial assistance was received or not.*

- Submit the completed application and all required documents to:

**Tuition Reimbursement Program
Dept. of Human Resources, Suite 100
Michaelian Office Building, 148 Martine Avenue
White Plains, New York 10601**

- First class mail or hand-delivery is recommended.
- **DO NOT RELY ON INTER-OFFICE MAIL**, since there is no guarantee that your application will be received by the filing deadline of January 8, 2018.
- It is the applicant's responsibility to assure that the completed application and all supporting documents have been received or postmarked by the filing deadline of January 8, 2018.
- The only documents accepted after January 8, 2018 are fall grades, due March 5, 2018.

Questions may be referred to Paula Nisbett through e-mail (par3@westchestergov.com) or by calling 995-3306.

CSEA members can find additional information on the union website: www.csea9200.com.

SOME APPLICANTS HAVE BEEN DENIED TUITION REIMBURSEMENT FOR FAILURE TO FOLLOW THESE DIRECTIONS. USE THE CHECKLIST BELOW TO MAKE SURE THAT YOU HAVE ENCLOSED ALL THE REQUIRED DOCUMENTS.

IS YOUR APPLICATION SIGNED & NOTARIZED (on page 4A)?	_____
DID YOU ATTACH GRADES (SPRING/SUMMER) to page 5A?	_____
(FALL GRADES if available now)	
DID YOU ATTACH THE SCHOOL BILL to page 6A?	_____
DID YOU ATTACH PROOF OF PAYMENT (METHOD) to page 7A?	_____
DID YOU ATTACH THE FINANCIAL ASSISTANCE STATEMENT to page 8A?	_____



2017 APPLICATION FOR TUITION REIMBURSEMENT

Your application and all documents must be submitted or postmarked by January 8, 2018.
Fall grades must be submitted or postmarked by March 5, 2018. No exceptions will be made.

Read the instructions on previous pages before completing the application.
You will not receive reimbursement if you fail to complete all questions.

1. NAME _____
(As it appears on your County payroll check/stub)

2. HOME MAILING ADDRESS: _____
(#) (Street) (Apt)

(Town) (State) (Zip Code)

3. HOME TEL #: _____ 4. WORK TEL #: _____ 5. E-MAIL: _____

6. DEPARTMENT: _____ 7. DIVISION: _____

8. OFFICE ADDRESS: _____

9. OFFICIAL JOB TITLE: _____

10. CHECK ONE: CSEA ___ MGMT/CONFIDENTIAL ___ TEAMSTER ___ COBA/SOA ___

11. ORIGINAL DATE OF HIRE: _____

12. SCHOOL(S) ATTENDED IN 2017: (1) _____

(2) _____ (3) _____

(Complete questions #13-20. Do not use "See Attached" as a substitute for completion.)
Please remember courses must be completed by 12/31/2017 in order to be eligible for reimbursement.

13.

Course Number	Course Title	School	Which Semester	# of Credits Per Course	Tuition Cost Per Course

- 14. TUTION SUBTOTAL _____
- 15. Subtract Financial Assistance, Grants, Scholarships, excluding loans --- _____
- 16. TOTAL REIMBURSEMENT REQUEST \$ _____

At this time, requests over \$10,000 will be calculated as \$10,000. The maximum to be considered for reimbursement is the amount requested. It is the applicant's responsibility to accurately compute tuition costs.

17. Does this course lead to a degree? Yes () No () Certificate ()

- If yes, indicate:
1. Type of Degree (AA, BS, MA, etc.) _____
 2. Expected graduation date _____
 3. Program/major _____

18. Briefly describe how your present studies relate to your County job, career goals in County government, or the functions of the County.

19. FINANCIAL ASSISTANCE (EXCLUDING LOANS):

(types of financial assistance: MAP, TAP, PELL, SEOG, scholarships, department grants, etc.)

I have received or expect to receive financial assistance for courses listed on page 2A.

Yes _____ No _____

<u>Type of Assistance</u>	<u>Semester</u>	<u>Amount</u>
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TOTAL FINANCIAL ASSISTANCE RECEIVED/TO BE RECEIVED \$ _____

20. STUDENT LOANS (Guaranteed loans are not financial assistance for these purposes.)

I have received or expect to receive student loans for courses listed on page 2A.

Yes _____ No _____

<u>Type of Loan</u>	<u>Semester</u>	<u>Amount</u>
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TOTAL AMOUNT OF LOAN PAID DIRECTLY TO SCHOOL: \$ _____

ALL STATEMENTS ARE SUBJECT TO VERIFICATION

THIS AFFIRMATION MUST BE COMPLETED: I affirm that all statements made on this application (including any attached papers) are true under the penalties of perjury.

PURSUANT TO 210.45 OF THE NEW YORK STATE PENAL LAW, IT IS A CRIME PUNISHABLE AS A CLASS "A" MISDEMEANOR TO KNOWINGLY MAKE A FALSE STATEMENT HEREIN.

Furthermore, I certify I have attached the required documentation as noted in the box below.

Signature of Applicant

Date

Notary signature/stamp

Date

CHECK LIST

REQUIRED DOCUMENTS TO ATTACH

- ____ All Grades (except Fall Courses due 3/5/18) on page 5A
- ____ Itemized School Bill on page 6A
- ____ Proof of Payment on page 7A
- ____ Financial Assistance Statement signed by school on page 8A

YOUR SIGNATURE ABOVE MUST BE NOTARIZED

APPLICATION DEADLINE: JANUARY 8, 2018 FALL GRADES DEADLINE: MARCH 5, 2018

GRADES

STAPLE YOUR GRADES TO THIS PAGE. FOR A CERTIFICATE COURSE, STAPLE A COPY OF CERTIFICATE OR WRITTEN PROOF OF SUCCESSFUL COMPLETION.

**Only Fall Semester grades will be accepted after the January 8, 2018 deadline.
Mark your calendar so you do not miss the March 5, 2018 fall grades deadline.
An official transcript is not required.**

YOUR APPLICATION WILL NOT BE CONSIDERED IF YOU FAIL TO ATTACH YOUR GRADES.

SCHOOL BILL

STAPLE ITEMIZED SCHOOL BILL SHOWING CHARGES AND PAYMENTS TO THIS PAGE.

YOUR APPLICATION WILL NOT BE CONSIDERED IF YOU FAIL TO ATTACH YOUR ITEMIZED
SCHOOL BILL.

PROOF OF PAYMENT

STAPLE YOUR PAYMENT METHOD TO THIS PAGE.

YOUR APPLICATION WILL NOT BE CONSIDERED IF YOU FAIL TO ATTACH PROOF OF PAYMENT.

Check the appropriate boxes indicating all proofs of payment you have attached to this page.

A copy of the school bill that you attached on page 6A is NOT adequate for this page.

- Copies of cancelled checks (front and back)
- Credit card receipt or monthly credit card statement
- Cash receipt
- Copy of loan agreement and written acknowledgement from school of payments received directly from funding source.



ALL APPLICANTS MUST COMPLETE & HAVE THEIR SCHOOL SIGN THIS FINANCIAL ASSISTANCE STATEMENT *WHETHER ANY ASSISTANCE WAS RECEIVED OR NOT.*
FILING DEADLINE: JANUARY 8, 2018

WESTCHESTER COUNTY FINANCIAL ASSISTANCE STATEMENT

To be completed for each school attended.

EMPLOYEE (STUDENT): _____ STUDENT ID# _____

SCHOOL NAME: _____

THIS SECTION

To be completed by school official. Please check and complete #1 or #2.

____ 1. _____ **DID NOT** receive financial assistance
(STUDENT NAME) (such as grants, scholarships) for 2017 courses
excluding loans.

____ 2. _____ **DID** receive financial assistance (such as
(STUDENT NAME) TAP, MAP, Pell grant, scholarships, etc.)

_____ SPRING '17 for \$ _____

_____ SUMMER '17 for \$ _____

_____ FALL '17 for \$ _____

_____ OTHER '17 for \$ _____

TOTAL FINANCIAL ASSISTANCE RECEIVED (EXCLUDING LOANS) \$ _____

SIGNATURE OF SCHOOL OFFICIAL

PRINT NAME

TITLE

TELEPHONE NUMBER

DATE

FAX NUMBER

E-MAIL ADDRESS

Frequently Asked Questions

- 1. Are online courses eligible?** Yes, providing they are taken from an accredited school and meet all other eligibility requirements.
- 2. I would like to go for my Masters or PhD. Will that be acceptable?** Yes, coursework in Masters or PhD is acceptable so long as the coursework meets all other eligibility requirements.
- 3. How much will I be reimbursed? Will I know right away?** The amount reimbursed depends on the number of successful applications we receive. You will know your final amount typically in June.
- 4. I work on an hourly or per diem basis in a County department. Am I eligible?** No, the guidelines state you must be a part-time/full-time employee receiving county benefits to be eligible.
- 5. I am going for my Bachelors Degree in coursework related to County business. However, I must take elective courses for my degree, such as Art, English and Philosophy. Will those courses be covered under the program?** Yes, elective coursework taken as part of pursuing a degree related to County business is covered so long as coursework meets all other eligibility requirements.
- 6. Are Winter/Interim courses acceptable?** Yes, coursework taken in the Program year (Winter, Spring, Summer, Fall) is acceptable, providing coursework meets the guidelines, and concludes in the Program year.
- 7. What if my coursework does not lead to any type of degree?** Providing it meets the guidelines set forth by the committee, it may be eligible for tuition reimbursement.
- 8. What if I fail a course?** Under the Tuition Reimbursement guidelines, the minimum grade is a C (2.0 GPA on a 4.0 scale).
- 9. What if I'm unsure if my coursework relates to county business?** Submit the application with a County job spec and a clear description of how the coursework relates to specific county business to support your request. The committee will make the final decision.
- 10. Do I need to obtain an official transcript for my application?** No, we do not require an official transcript; you may, for instance, download it from the Internet, so long as we can verify that it is, in fact, your transcript.