

PROCEDURE 503-1

EDUCATIONAL REIMBURSEMENT PROGRAM

Effective 01-01-2020, Resolution No. 044-19

Eligibility

Full-time regular and part-time partial-plus employees are eligible for this benefit, provided that they have completed the Introductory Period and are employed by the County on each of the following dates: 1) the date of application; 2) the date the course commences; 3) the date reimbursement is requested; and 4) the date reimbursement is processed for payment. Former employees will not be eligible for reimbursement regardless of their active status at the time the class was taken.

Degree and Non-Degree Programs

The Educational Assistance Program provides reimbursement of tuition and other expenses related to courses taken in the pursuit of a degree, as well as tuition and expenses related to non-degree courses at approved institutions.

Program Criteria. The program must meet the following criteria:

- The degree or course is consistent with the employee's ability, potential, and scholastic background or a reasonable chance exists for the employee to use the acquired knowledge for the benefit of Johnson County.
- The degree or course is reasonably applicable to the work the employee is doing or for which the employee might reasonably be expected or qualified to do.
- The required curriculum leading to the degree or completion of a non-degree program and the number of hours to be completed is reasonable.
- The degree or course is in a field of interest to the organization and a reasonable chance exists for the County to derive some benefit from it.

Reimbursable Fees and Expenses. The following expenses may be eligible for reimbursement:

- Tuition for eligible courses including:
 - Formal college-credit courses offered by an accredited college or university.
 - Online courses offered by an accredited college or university.
 - Adult education non-credit and/or non-degree courses offered by an accredited institution, including public school systems, colleges, or universities.
 - Private business, technical, or vocational courses when comparable training is not available through one of the above categories of education providers. (Before approving such courses, the department/agency/office should evaluate the school's standards and determine if costs are compatible with the level of training received.)
 - Required courses within a curriculum that lead to a degree in a field of interest to the County, even though these courses are not specifically job-related.
- Required Textbooks, Supplies, and Fees:
 - Textbooks may include books in printed or electronic format (including shipping charges if purchased online) and newspaper or periodical subscriptions provided the materials are required for the enrolled course(s).
 - Expenses for required course-specific supplies or tools, but not the cost of typical school supplies.

- Fees assessed by the institution that are required for enrollment in and completion of an approved course or degree and are not refundable, but excluding recreational/activity fees, health fees, and parking fees.

Conditions of Reimbursement. Subject to budget availability, the County will reimburse 100% of approved eligible expenses, up to the annual maximum, provided that the employee earns the required grade as reflected below. Tuition and expenses for dropped classes will not be reimbursed.

Course Type	Letter Grade	Numerical Grade on 4.0 Scale
Graduate/Post-Graduate	B	3.0
Undergraduate (Bachelor or Associate)	C	2.0
Non-degree Courses	C	2.0
Pass/Fail	Pass	Pass

If an employee receives other financial assistance (i.e. grants, scholarships or waivers), the County's assistance will apply only to those amounts not covered by other sources. Tuition costs paid with student or other loans will be eligible for reimbursement, contingent on the employee providing appropriate documentation.

Certification and Licensing Assistance

The Educational Reimbursement Program provides reimbursement of expense related to programs through which an employee obtains a professional license or certification as a result of passing a uniform examination, such as CPA, PHR, or CPM. The benefits under this Plan allow time and expense reimbursement for the preparation for and taking of an examination required to obtain a County-approved certification or license.

The approval of expenses related to obtaining a certification or license is made by the employee's manager/supervisor and Educational Reimbursement Review Committee (ERRC), and is based on the eligible expenses as described below and the supporting documentation provided at the time of the request.

Program Criteria. To qualify for assistance:

- The certification or license must relate to the employee's job function or career.
- The employee must incur expenses related to completing the program to obtain the certification or license and must not be reimbursed for these expenses in any other manner.

Expenses associated with maintaining a certification or license are not eligible for reimbursement under the Educational Reimbursement Program. When maintaining a certification or license is necessary for an employee to perform their job, reimbursement may be made through business expense if approved by the employee's department/agency/office.

Eligible Expenses. The following expenses are eligible for reimbursement:

- Examination fees: Employees may be reimbursed the cost of sitting for an exam related to a specific certification or license. No more than two sittings for the examination are eligible. If a second sitting

is necessary, it is recommended that the employee complete an approved review course prior to the second sitting. If a series of examinations is required to obtain a certification or license, two sittings are permitted for each examination in the series.

- Other expenses associated with an examination: Employees may be reimbursed for application fees, fees associated with a required background check, and other approved required fees.
- Review courses: Employees may be reimbursed for the cost of one review course, provided that they qualify and sit for the examination. The review course must be approved by the employee's department/agency/office in advance and must be specific to the certification or licensing examination being taken. Books, materials, and fees required as a part of the review course, including online or electronic review courses or materials, are also eligible for reimbursement.
- Expenses related to a review course cannot be submitted until the employee sits for the exam, unless the employee is prevented from completing the course or from taking the exam because of a job-related reason such as a change in work schedule or a significant increase in work load. In that case, the expenses may still be eligible subject to approval by the department/agency/office.

Education Reimbursement Review Committee

Applications will be reviewed and approved by the EERC. The ERRC is comprised of two standing members from the Benefits Division of the Department of Financial Management & Administration (FMA-Benefits), one member from the Department of Human Resources, and two members from other departments/agencies/offices. The ERRC will allocate budgeted funds, approve or deny all requests, and process all requests for reimbursement consistent with this procedure and such other FMA-Benefits Practices as may be approved.

All decisions made by the ERRC are final. Employees may not seek review of an ERRC decision through the Dispute Resolution Process, but may submit a request for reconsideration to the ERRC within five business days of the denial date.

Procedures

Employees will complete an application for Educational Reimbursement and submit it to their department/agency/office leader for consideration.

After approval by the department/agency/office, the application will be forwarded to FMA-Benefits for review by the ERRC. Any request received after a published deadline will be considered only after all other reimbursements have been made. The ERRC may request additional information from an employee as may be necessary to properly approve or deny an employee's request for reimbursement. Failure to promptly provide the information may result in denial of reimbursement.

If the request is approved by the ERRC, the employee will submit grade report(s), tuition receipt(s), and receipts for any additional eligible expenses to FMA-Benefits. All required documentation must be submitted within six weeks of completion of the course or term associated with the approved course(s).

Expenses that exceed the annual maximum may not be carried over for reimbursement in the following calendar year.