

Department of Human Resources

**TUITION REIMBURSEMENT
2009 GUIDELINES, INSTRUCTIONS & APPLICATION**

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

September 2009

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

2009 ELIGIBILITY GUIDELINES

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

Employment:

- Full or part time continuous employment (at least 17-1/2 hours per week) with the County.
- 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 a reduction-in-force ONLY, provided that the applicant started the course(s) to be considered for reimbursement prior to separation.

Courses:

- A course must be completed by 12/31/09 to be eligible for the 2009 program. If a course begins in 2009 and ends in 2010, the reimbursement request must be made for the year the course is completed. If a course began in 2008 and ended in 2009, you must attach documentation showing beginning & ending dates of course.
- Courses, academic degrees & educational programs must relate to County business. The Committee reserves the right to use its discretion to deny requests for courses not deemed appropriate.
- 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, scholarships) 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.
- 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 an \$8,000 cap on requested reimbursement expenses. All requests over \$8,000 are calculated as \$8,000.
- 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 2009 tuition will be made in June, 2010.
- ONLY TUITION is reimbursable. Excluded are fees, textbooks, supplies, etc.
- 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 Friday, January 8, 2010.

The application and attached documents must be completed, signed, postmarked or received by the Department of Human Resources by January 8, 2010. 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 Kara Merrill Verma at kqm8@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 1/8/10 deadline are the **fall semester grades, due by March 3, 2010.** 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 2009, *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, 2010.**
- **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, 2010.**
- **The only documents accepted after January 8, 2010 are fall grades, due March 3, 2010.**

Questions may be referred to Kara Merrill Verma through e-mail (kqm8@westchestergov.com) or by calling 995-2109.

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? | _____ |

(Complete questions #13-20. Do not use "See Attached" as a substitute for completion.)

13.

| Course Number | Course Title | School | Which Semester | # of Credits Per Course | Tuition Cost Per Course |
|---------------|--------------|--------|----------------|-------------------------|-------------------------|
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14. TUTION SUBTOTAL _____

15. Subtract Financial Assistance, Grants, Scholarships, excluding loans --- _____

16. TOTAL REIMBURSEMENT REQUEST \$ _____

At this time, requests over \$8,000 will be calculated as \$8,000. 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> |
|---------------------------|-----------------|---------------|
|---------------------------|-----------------|---------------|

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> |
|---------------------|-----------------|---------------|
|---------------------|-----------------|---------------|

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 3/3/10) 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, 2010 FALL GRADES DEADLINE: MARCH 3, 2010

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, 2010 deadline.
Mark your calendar so you do not miss the March 3, 2010 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, 2010

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 2009 courses
excluding loans.

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

_____ SPRING '09 for \$ _____

_____ SUMMER '09 for \$ _____

_____ FALL '09 for \$ _____

_____ OTHER '09 for \$ _____

TOTAL FINANCIAL ASSISTANCE RECEIVED (EXCLUDING LOANS) \$ _____

SIGNATURE OF SCHOOL OFFICIAL

PRINT NAME

TITLE

TELEPHONE NUMBER

DATE

FAX NUMBER

E-MAIL ADDRESS