

TUITION REIMBURSEMENT FOR YALE & NON-YALE COURSES
POLICIES AND PROCEDURES
FOR
C&T, S&M and M&P Employees Only

Employee Eligibility

This benefit is available for Clerical & Technical (C&T), Service & Maintenance (S&M), and Managerial & Professional (M&P) staff members.

1. Participant must be a regular full-time employee **OR**
2. Part-time employee who is scheduled to work 20 or more hours per week and who has completed six months of service. (The benefit will be prorated equal to the employee's regular work hours divided by 37.5). **AND**
3. Employee must be on the payroll at the beginning and completion of course(s).

Course Information

Tuition Assistance is applicable to the following degree programs and job-related course(s):

Degree Programs

1. The University will partially reimburse employees for a course taken toward an Associate's, Bachelor's, Master's or Doctoral degree. Courses considered prerequisites for any of the above will not be approved.
2. The University will reimburse for courses offered at eligible colleges and universities, including Yale, in the United States only. Reimbursement excludes classes that are covered under the Yale Tuition Reduction program (Tuition Reduction is available at the following schools and programs: Yale College, Yale College Summer Program, Eli Whitney Students Program and Yale Graduate School of Arts and Sciences).
3. Courses taken within the State of Connecticut must be taken outside working hours at a degree-granting college or university accredited by an agency of the Council on Post-Secondary Accreditation (COPA) or by the Board of Governors for Higher Education, Connecticut Department of Higher Education and must have credit hours associated with each.
4. Courses taken outside of the State of Connecticut must be taken outside working hour, at a degree granting college or university and must meet that state's accreditation guidelines and must have credit hours associated with each.
5. On-line degree course(s) are eligible for reimbursement and must be taken outside working hour, at a degree granting college or university and must meet that state's accreditation guidelines and must have credit hours associated with each.

Non-Degree /Job-Related Courses

1. The University will partially reimburse employees for courses not leading to a degree if they are job-related and of direct benefit both to the employee and to the University. Employees enrolled in a non-degree/Job-related course(s) will need their supervisor's approval authorizing that the Non-Degree/Job-Related course(s) is job-related, after submitting the application.
2. The University will reimburse for courses offered at eligible colleges and universities in the United States only.
3. Courses taken within the State of Connecticut must be taken outside working hours at a degree-granting college or university accredited by an agency of the Council on Post-Secondary Accreditation (COPA) or by the Board of Governors for Higher Education, Connecticut Department of Higher Education and must have credit hours associated with each.
4. Courses taken outside of the State of Connecticut must be taken, outside working hours, at a degree granting college or university outside of the State of Connecticut must meet that state's accreditation guidelines and must have credit hours associated with each.
5. On-line degree course(s) are eligible for reimbursement and must be taken outside working hour, at a degree granting college or university and must meet that state's accreditation guidelines and must have credit hours associated with each.

Courses Excluded from Reimbursement

1. Courses offered at Yale University covered under the Tuition Reduction program.
2. Expenses involved in workshops, seminars, conferences, institutes, courses for which continuing education units (CEUs) are awarded and courses at non degree-granting institutions which are required by management as essential to the performance of an employee's job. These are considered an expense of the department involved and are not covered by this benefit.
3. The eligibility rules and requirements for courses taken outside working hours at accredited, degree-granting institutions apply only to centrally funded tuition assistance and may be waived when a department provides funding.

Reimbursement Eligibility

1. A letter grade of a "C-" or higher **OR** a letter grade of "P" (Pass) is required.
2. Course(s) must have credit hours associated with each.
3. The University will partially reimburse the employee for tuition fees and laboratory fees only.
4. The calendar year in which the course(s) are submitted and approved will be the same calendar year in which the reimbursement funds are applied.
5. Employees must submit paperwork **NO LATER THAN 90 DAYS** after the course completion date. Claims submitted must include complete documentation.
Important Note: for fall classes, claims must be filed before the University recess period begins in order to ensure that reimbursement will be applied to the current calendar year. During this time, EdAssist will accept a copy of an e-mail or memo (on the institution's letter head) from your professor with a "pass" grade in lieu of your final transcript.

Method of Reimbursement

1. Employees should review the program policies & procedures to ensure eligibility prior to the start of a degree program or job-related course(s).
2. Prior to the start of a degree program or job-related course(s), employees may request a Deferment Letter. Deferment letters are issued for participating colleges/universities and afford employees the opportunity to defer their out-of-pocket course expense until the end of the semester/trimester, etc. The employee is responsible for any fees incurred as a result of the deferment arrangement with the participating college/university. The University does not reimburse the college or university directly.
3. To be eligible to receive education assistance, an employee must submit a course approval application for each course taken. Applications will not be accepted 90 days after the course end date. Applications will be reviewed for policy compliance by the program administrator. Certificate applications need preapproval and will be forwarded to the employee's immediate manager. Submit Certificate applications before the course start date.
4. Employees must indicate on the tuition assistance application the amount of financial assistance they receive from other sources, e.g., scholarships, grants or programs for educational funding. Scholarships and grants (monies not out of pocket) are subtracted from your out-of-pocket tuition and lab fee expenses.
5. Upon application approval, the employee is responsible to make all required payments directly to his/her school and will be reimbursed for eligible expenses upon successful course completion. The employee is responsible for submitting proof of successful course completion (grades) and an itemized invoice of tuition and fees and proof of payment within 90 days after course completion in order to receive reimbursement.
6. Guidelines for amount of reimbursement per employee group are displayed in the following charts.

Clerical & Technical (C&T) and Service & Maintenance (S&M) – Amount of Reimbursement

	Full-time employees with less than five years of service are reimbursed for 75% of their course tuition and laboratory fees up to, and not exceeding, the course and calendar year maximums below.	Full-time employees with five years or more of service are reimbursed for 100% of their course tuition and laboratory fees up to, and not exceeding, the course and calendar year maximums below.	
Calendar Year	Maximum per Course	Maximum per Calendar Year	Maximum per Course
2016	\$767.00	\$2625.00	\$1533.00

Part-time employees who have completed six months of continuous employment prior to the start of the degree program or job-related course(s) will be receive a prorated benefit equal to the employee's regular work hours divided by 37.5

Examples of Reimbursement:

Example 1: A full-time C&T/S&M employee with four years of service completes a three-credit course and submits the following tuition bill:

Tuition: \$1050.00 Registration fee: \$50.00 (not reimbursable) Laboratory fees: \$75.00

Reimbursement is calculated as follows: $(\$1050 + \$75) \times 75\% = \$843.75$. The reimbursement amount would be **\$767** (the maximum amount of reimbursement per course).

Example 2: A full-time C&T/S&M employee with four years of service completes a three-credit course and submits the following tuition bill:

Tuition: \$1050.00 Registration fee: \$50.00 (not reimbursable) Laboratory fees: \$75.00 Scholarship: \$500

Reimbursement is calculated as follows: $(\$1050 + \$75 - \$500) \times 75\% = \468.75 . The reimbursement amount would be **\$468.75** (reimbursement did not exceed per course maximum).

Example 3: A full-time C&T/S&M employee with seven years of service completes a three-credit course and submits the following tuition bill:

Tuition: \$1500.00 Registration fee: \$50.00 (not reimbursable) Laboratory fees: \$75.00

Reimbursement is calculated as follows: $(\$1500 + \$75) \times 100\% = \$1575.00$. The reimbursement amount would be **\$1533** (the maximum amount of reimbursement per course).

Example 4: A full-time C&T/S&M employee with seven years of service completes a three-credit course and submits the following tuition bill:

Tuition: \$1500.00 Registration fee: \$50.00 (not reimbursable) Laboratory fees: \$75.00 Scholarship: \$500

Reimbursement is calculated as follows: $(\$1500 + \$75 - \$500) \times 100\% = \1075.00 . The reimbursement amount would be **\$1075** (reimbursement did not exceed per course maximum).

Managerial & Professional Employees (M&P) – Amount of Reimbursement

Full-time employees are reimbursed for 100% of their course tuition and laboratory fees up to, and not exceeding, the course and calendar year maximums below.

Maximum per Course	Maximum per Calendar Year
\$2000.00	\$5250.00

Part-time employees who have completed six months of continuous employment prior to the start of the degree program or job-related course(s) will receive a prorated benefit equal to the employee's regular work hours divided by 37.5

Examples of Reimbursement:

Example 1: A full-time M&P employee completes a three-credit course and submits the following tuition bill: Tuition:

\$1925.00 Registration fee: \$50.00 (not reimbursable) Laboratory Fees: \$75.00

Reimbursement is calculated as follows: $(\$1925 + \$75) \times 100\% = \$2000.00$. The reimbursement amount would be **\$2000** (the maximum amount of reimbursement per course).