

**Subject:** Tuition Reimbursement Program for Non-Represented Employees

**Summary:** Procedures and guidelines regarding tuition reimbursement for non-represented employees. Details regarding tuition reimbursement for represented employees are covered in the applicable collective bargaining agreements.

**Details:** The tuition reimbursement program has been established to benefit the District by providing its employees with development opportunities for more effective performance in current or future assignments. Tuition reimbursement will be approved for specific coursework, or for coursework necessary for a specific degree program that is directly related to an employee's current position or for a possible future assignment within the organization. The Director of Human Resources is responsible for this procedure and shall interpret the provisions of this program in the best interests of the District. The Training Manager is responsible for reviewing and approving applications for tuition reimbursement. Employees who wish to apply for tuition reimbursement are responsible for reading, understanding, and following this procedure.

**I. General Guidelines**

- A. Eligible employees will be reimbursed for the cost of approved undergraduate and graduate on-line or classroom courses, as well as non-credit or certificate courses, at a rate of 75% of tuition costs up to a maximum reimbursement of \$5,250 per calendar year. Reimbursements are limited to approved tuition costs, laboratory costs, and mandatory fees levied on all students.
- B. Employees must earn a minimum grade of "C" for approved classes or demonstrate satisfactory completion of the class.
- C. If an employee receives any financial assistance for an approved class such as scholarships, grants, Veterans Administration benefits, or other sources, only the tuition and approved fees paid in excess of the total value of financial assistance are eligible for reimbursement.
- D. Classes begun prior to an employee's start date are not eligible for tuition reimbursement.
- E. New employees appointed to a civil service position may submit an application and begin an approved class prior to passing probation; however, prior to receiving tuition reimbursement, they must pass probation.
- F. New employees who are exempt from civil service status may submit an application and begin an approved class prior to completing six months of employment; however, prior to receiving tuition reimbursement, they must complete six months of employment.
- G. Employees are responsible for paying any tuition and fees that are not covered by this procedure.
- H. No reimbursement will be allowed if employees do not complete a course.

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- I. Claims for reimbursement which are received more than six months after the completion of the course may be denied.
- J. Tuition reimbursement amounts above the annual limit identified by the Internal Revenue Service are subject to taxes to be paid by the employee.

**II. Procedures**

**A. Course Eligibility Requirements**

- 1. Eligible tuition costs associated with approved on-line or classroom coursework will be reimbursed when:
  - a. The class is pre-approved and is compatible with the interests of the District.
  - b. The school where the class is taken is accredited by the North Central Association of Colleges and Secondary Schools or an accrediting agency recognized by the U.S. Department of Education. Classes not offered by an accredited institution may be considered if a comparable class is not offered by an accredited institution.
  - c. The class is taken for credit, unless credit is not available for the class.
  - d. The class is conducted during non-working hours.
  - e. The employee completes the course and attains the required grade, or certification of successful completion.
- 2. Eligible tuition costs associated with correspondence classes, or classes sponsored by organizations other than accredited institutions, may be considered if the class cannot be obtained through a local college or university.
- 3. Eligible costs associated with smoking cessation classes may be eligible for reimbursement.

**B. Tuition Reimbursement Application Procedures**

- 1. All tuition reimbursement applications must be submitted to the Training Section and approved prior to the beginning of the course. Failure to do so may result in disapproval of the application.
- 2. Employees who wish to substitute an approved course with a different eligible course must provide a written request, including the reason for the substitution, to the

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Training Manager within the first two weeks of class. Failure to do so may invalidate the reimbursement claim.

**C. Tuition Reimbursement Procedures**

Before the District reimburses an employee for eligible costs of an approved course, the employee must submit all of the following documents to the Training Section:

1. A copy of the statement of charges from the school including a detailed listing of classes, tuition charges, fees, scholarships, grants, discounts, and any other adjustments.
2. A copy of cash receipts, canceled checks, credit card receipts, or a statement from the school clearly stating the amount paid and method of payment.
3. The grade report or a certificate of satisfactory completion for non-credit/non-grade classes. Reports or certificates downloaded from the school's website may be acceptable.
4. A class schedule stating the days and times of the class taken.

After all required documents are approved for payment, employees will receive tuition reimbursement of eligible costs in their regularly scheduled paycheck.

**D. Deferred Tuition Payment**

Schools generally require full payment of all coursework costs at the time of registration. Some schools have a deferred tuition payment program, which allows students to defer payment of reimbursable costs if the student works for an employer that has a tuition reimbursement program.

Eligible employees who wish to apply for deferred tuition payment must:

1. Inform the Training Section at the time of application by checking the box marked "Deferred Tuition." When the course is approved, a letter will be prepared for the student to take to the school certifying that the District is responsible for tuition and reimbursable costs only, upon successful completion of the course.
2. After completing the course, employees must submit the required documents for reimbursement. Employees will be responsible for submitting payment to the school and for paying tuition and fees that are not covered by tuition reimbursement, including any fees associated with deferred tuition and late payment fees.

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3. New employees will not be approved for deferred tuition until they have passed probation.

**E. Tuition Reimbursement Repayment Procedures**

Employees who voluntarily leave the District after receiving tuition reimbursement payment are required to make repayment to the District according to the following schedule:

1. 100% repayment for all courses for which reimbursement is received within one year of leaving District employment.
2. 75% repayment of all courses for which reimbursement is received between one and two years of leaving District employment.
3. 50% repayment of all courses for which reimbursement is received between two and three years of leaving District employment.

Repayment must be made prior to separation and may be made in the form of cash, cashier's check, money order or by an adjustment to the employee's final paycheck. If repayment is not made prior to separation, the District will withhold the amount of repayment from the employee's final pay check, or from any other source of District-controlled funds that would be due to the employee.

**References:**

Supersedes Directive GS 03-7 (Revision 2)

10.4.1 Application for Tuition Reimbursement on the District's Portal

Sincerely,



Richard Lanyon  
Executive Director

RL/DEK

**Metropolitan Water Reclamation District of Greater Chicago**  
**APPLICATION FOR TUITION REIMBURSEMENT**

☐ Deferred Payment Program

Complete this application and forward to the Department of Human Resources, Training Section. A copy will be returned to you after final approval has been granted. **This application must be submitted before you start the requested class/classes.** Employees taking classes before approval has been granted may not be reimbursed for those classes. List only those classes for a single term, quarter or session.

*Please print or type*

Date \_\_\_\_\_

Name \_\_\_\_\_ Employee Number \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_, IL Zip Code \_\_\_\_\_

How long have you been an employee of the District? Years \_\_\_\_\_ Months \_\_\_\_\_

Present Job Title \_\_\_\_\_ Department \_\_\_\_\_

Section # \_\_\_\_\_ Work Location \_\_\_\_\_ District Phone \_\_\_\_\_

Your purpose in taking the specified course(s) is to: \_\_\_\_\_

a. Obtain the following degree: ☐ Associate's ☐ Bachelor's ☐ Master's ☐ Doctoral

Major field of study \_\_\_\_\_

b. ☐ Increase job knowledge or to prepare for a possible promotional opportunity.

Name of school you wish to attend \_\_\_\_\_

Classes are on: ☐ Semester Basis ☐ Quarter Basis ☐ Other

Classes are online: ☐ Yes ☐ No

**FOR HUMAN RESOURCES DEPARTMENT USE ONLY**

Actual Tuition

Reimbursement

Approval

List the courses you wish to take during this semester, quarter or session.

Course No.	Course Title	Credit Hours	Estimated Tuition
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Date course(s) begin \_\_\_\_\_ Date course(s) end \_\_\_\_\_

How will the course(s) listed above improve your ability to perform your present or possible future responsibilities?

Will any portion of the tuition costs associated with the course(s) listed above be covered by veteran's benefits, scholarships, federal grants-in-aid or other tuition assistance programs? ☐ Yes ☐ No

If yes, specify kind of assistance and amount of anticipated aid.

**IT IS THE POLICY OF THE DISTRICT TO REIMBURSE, WITHIN THE DOLLAR LIMITATIONS OF THE PROGRAM, TUITION COSTS MINUS THE AMOUNT OF ASSISTANCE PROVIDED BY OTHER SOURCES.**

I CERTIFY THAT: (a) If I am receiving tuition assistance from another source I have indicated the fact; (b) I have indicated the correct amount of that aid to the best of my knowledge at this time; (c) I understand that the falsification of this information may result in the denial of reimbursement and may result in disciplinary action and; (d) I have received and read a copy of the Tuition Reimbursement Program Guidelines.

\_\_\_\_\_  
SIGNATURE OF APPLICANT

Recommend: ☐ Approval

☐ Disapproval

\_\_\_\_\_  
TRAINING MANAGER

\_\_\_\_\_  
DATE