



# ADMINISTRATIVE PROCEDURES

Procedure Number: 23-1

Effective Date: 08/01/1984

Revision Date: 12/02/2009

*C. Dunkelberg*  
County Administrator

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**SUBJECT: EDUCATIONAL REIMBURSEMENT PROGRAM FOR EMPLOYEES**

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**DEPARTMENT RESPONSIBLE: Human Resources Department**

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## **I. STATEMENT**

The objective of the Educational Reimbursement Program is to provide a means for employees to become more efficient at work, to upgrade skills, and/or to improve the quality of County services.

## **II. EMPLOYEE ELIGIBILITY**

Any permanent, full-time, variable-time or part-time employee (20 hours per week or more) who has successfully completed an initial probation period, when applicable, and continues to perform the duties of his/her position at a satisfactory level.

## **III. COURSE ELIGIBILITY**

- A. Education Assistance will be provided for courses of instruction taken at, or through, accredited private and public institutions of learning such as universities, colleges, trade schools or technical institutions, and in some cases, professional organizations granting certification or licensing. Certain out-of-state correspondence courses are also eligible as long as the institution is fully accredited.
- B. To qualify for reimbursement, a course must meet one of the following conditions:
1. It is directly job related,
  2. It relates to the class specifications of a position in a related career track,
  3. It is a required course in a curriculum program leading to a degree, certificate or license.
- C. Courses taken must be for an academic grade, pass/fail credit, certification or licensing.
- D. Undergraduate courses in a degree program must be completed with a grade of "C" or better, or "pass" if it is a pass/fail option to qualify for reimbursement.

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- E. Graduate level courses in a degree program must be completed with a grade of "B" or better, or "pass" if it is a pass/fail option to qualify for reimbursement.
  - F. Courses leading to certification or licensing must be completed with official documentation supporting successful progress.
  - G. Courses taken for "audit" or "no credit" purposes do not qualify for reimbursement.
  - H. Course credits given by examination only (i.e., CLEP, etc.) or for job related experience do not qualify for reimbursement.

#### **IV. LEVEL OF ASSISTANCE**

- A. Reimbursement may be authorized for 75% of tuition, course related fees and laboratory fees up to a maximum of \$1,200.00 per fiscal year, not to exceed \$400.00 in one semester (Fall, Spring, Summer).
- B. Enterprise and Special Revenue Departments will be charged for educational reimbursements incurred by their employees and may limit payments of individual education reimbursements to 50% or \$400.00 (whichever is less) of tuition, course related fees and laboratory fees up to a maximum of \$1,200.00 per fiscal year, not to exceed \$400.00 in one semester.
- C. When the demand for funds exceeds the available amount budgeted, the Human Resources Director may limit reimbursement to 50% of the assistance requested in all cases listed above.
- D. This program may be suspended by the County Administrator at any time and without advance notice when financial constraints exist. If financial conditions improve the County Administrator may consider reinstating funding for this program.
- E. Application fees, assessment fees, textbooks and late registration fees are not reimbursable.
- F. Employees who are receiving grants or scholarships may be eligible for reimbursement only for those costs that exceed the grant or scholarship.
- G. The fiscal year in which the course meets for the last time determines the fiscal year in which the course is eligible for reimbursement.

#### **V. PROCEDURES FOR APPROVAL**

- A. Within sixty (60) calendar days of successful completion of eligible course work, employees must submit a complete application packet to the Human Resources Department, Educational Reimbursement Coordinator. The application packet **must** include:
  - 1. A completed educational reimbursement application form with a signature indicating the department's approval and, if applicable, the fund and center number to which the reimbursement should be charged;

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2. One (1) official copy of the course description for **each** eligible class;
  3. One (1) copy of an official fees receipt from the institution attended, or one (1) copy of the canceled check or credit card receipt. **NOTE:** Pima County Credit Cards (P-cards) shall not be used to make payments directly or indirectly to the educational institution or organization;
  4. One (1) copy of the grade report, certification form, license or documentation supporting successful progress in cases of certification or licensing programs. Acceptable grade reports include those that are unofficial, accessed from the Internet or statements from the instructor on official letterhead from the educational institution.
- B. The Educational Reimbursement Coordinator will submit authorization for reimbursement of requests on a first-come, first served basis. Enterprise and Special Revenue Departments must include the fund and center number to which the reimbursement should be charged in the space provided on the Educational Reimbursement Form (Attachment 1).
- C. Upon timely receipt of the completed application packet, authorization for payment will be forwarded to Finance who will issue a check to the employee.
- D. No advance payment shall be made to employees for educational reimbursements and no payment will be made directly to an institution.
- E. Upon termination within six (6) months of receipt of educational reimbursement funds, an employee is required to return 50% of the total reimbursement received, in accordance with Personnel Policy 8-123. Employees in a layoff status who have exercised their reemployment/reinstatement rights are exempt from this provision.

## **VI. RESPONSIBILITIES**

- A. The employee must submit all required materials in a timely manner to the department and insure that it is forwarded to Human Resources within the time limits given.
- B. The employee's Department Director, or designee, must approve the eligibility of the course work before it is submitted to Human Resources for review, verification and reimbursement.
- C. The Human Resources Department must determine if the application packet was received on a timely basis, if all required information is included and if the final grade and coursework are acceptable.

Attachment 1

**PIMA COUNTY GOVERNMENT  
EDUCATIONAL REIMBURSEMENT APPLICATION**



You must first obtain course eligibility determination from your department. Then send the completed form and all necessary attachments to Human Resources, at 150 W. Congress - 4<sup>th</sup> Floor, for reimbursement processing (do not send originals). See Administrative Procedure 23-1 for eligibility criteria, deadline information and required attachments. Any form that is incomplete and/or received after 60 calendar days from the last day of class(es) will not be processed. Call 740-2791 if you have any questions.

**TO BE COMPLETED BY EMPLOYEE:**

TYPE OR PRINT CLEARLY IN BLACK OR BLUE

INK.

Last Name:		First Name:		M.I.:
				EIN:
Department:		Work Phone:		Home Phone:
Job Title:				Date of Hire:
Educational Institution Attended:				
COURSE NO.	TITLE	CREDIT HOURS	TUITION	FEES
Term Ending Date: (Month/Day/Year)		Amount of Grants or Scholarships Received:		Total Paid:
Check off each box to insure that all necessary materials are attached. Departments may determine eligibility of course work with or without all materials. However, all materials must be attached before any reimbursement request will be processed by Human Resources.				
<input type="checkbox"/> Completed application		<input type="checkbox"/> A copy of the official fees receipt		
<input type="checkbox"/> An official copy of the course description		<input type="checkbox"/> A copy of the grade report		
I certify that I have listed all grants or scholarships I have received, if any, and that I have indicated the total amount paid (less any grant or scholarship money) for the course(s) identified above. I agree that if I terminate my employment from Pima County within six (6) months of receipt of any educational reimbursement, I shall return 50% of the monies received or arrange with the department to have that amount withheld from my final paycheck, in accordance with Personnel Policy 8-123.A.4.				
Employee's Signature:				Date:

**TO BE COMPLETED BY DEPARTMENT:**

Department:	Approved Amount: (Enterprise/Special Funds Depts. Only)
Fund and Cost Center (Enterprise/Special Funds Depts. Only):	
Department Director or Designee Signature:	Date:

**TO BE COMPLETED BY HUMAN RESOURCES:**

Processed By:	Amount:	Time Stamp:
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