Policy 6504

From Human Resources

Revision as of 15:14, 24 October 2013 by Uballr1 (Talk | contribs)
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PERSONNEL POLICY MANUAL
MoDOT Personnel Policy Title: Educational Assistance **Policy Number**: 6504 **Chapter Title**: Training and Professional Development **Effective Date**: September 1, 2013 **Supersedes Policy Number**: 6504 **Dated**: January 15, 2011
Approved By: Micki Knudsen, Human Resources Director (Signature on file)

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POLICY STATEMENT

The department encourages employees to continue their education in order to develop their work skills and enhance their ability to compete for promotional opportunities. Educational assistance is provided

through tuition and/or test reimbursement and flexibility in work scheduling to eligible active and inactive employees.

DEFINITIONS

Active Employee: An employee working or on paid leave, such as annual leave, workers' compensation, sick leave, military training, etc.

Inactive Employee: An employee on unpaid leave, such as military leave, educational leave, or extended sick leave without pay. This also includes an employee approved for/receiving a work-related disability through the MoDOT and Patrol Employees' Retirement System (MPERS).

Eligible Active/Inactive Employee: An employee who meets the criteria as stated in paragraphs 1 through 3 under Provisions/Requirements.

Graduate Course: A course taken by an individual to be credited toward a master's degree. Courses to obtain post-graduate doctorate degrees will not be reimbursed.

PROVISIONS / REQUIREMENTS

Active Employees

1. An active employee must meet all of the following criteria to be eligible for the benefits under this personnel policy:

    A. Be a full-time salaried or permanent part-time employee who has successfully completed the department's initial six-month probationary period prior to enrollment in a course. For graduate course reimbursement, an employee must be in salary grade 11 or higher and must have a minimum of four years of service with MoDOT. Newly hired/promoted employees in salary grade 15 or above are eligible for graduate course reimbursement after they have completed their 6-month probationary period.

    B. Be in "good standing" (rated successful or higher on his/her most recent MoDOT Accountability and Performance System (MAPS) evaluation, is not on disciplinary probation, and has not received a suspension or demotion within the last 12 months).

    C. An active employee who has received additional education or training may compete for available positions. He/she will not be given priority placement consideration over other active employees who earned their degree prior to or during their employment with the department.

Inactive Employees

2. An inactive employee must meet all of the following criteria to be eligible for the benefits under this personnel policy:

A. Was approved for/is currently receiving work-related disability benefits from MPERS and is receiving workers' compensation lost time benefits at the same time.

B. Was a full-time salaried or permanent part-time employee at the time approved for work-related disability and had successfully completed the department's initial six-month probationary period.

C. Was rated successful or higher on his/her most recent MAPS, was not on disciplinary probation, and had not received suspension or demotion within the last 12 months when approved for work-related disability.

General Provisions

3. An eligible active or inactive employee who fails to complete a course, terminates his/her employment, or is released from department employment prior to course completion will not be eligible to receive reimbursement for the course.

4. An eligible inactive employee will not be eligible to receive reimbursement if workers' compensation lost time benefits cease prior to course completion or the employee fails to complete the course.

5. Prior to enrolling in any course(s), he/she should complete the Educational Assistance Program Eligibility Checklist to ensure that he/she qualifies for reimbursement, that his/her learning institution qualifies as an accredited university, that the degree he/she is pursuing qualifies for reimbursement, and that he/she is fully familiar with all of the parameters of this program. Further, by completing the Educational Assistance Program Eligibility Checklist , the employee is also obtaining confirmation that there are budgetary funds available for reimbursement.

6. The district engineer/division leader/state engineer has the discretion to approve or deny educational assistance and limit the number of credit hours allowed based upon available budgetary funding.

7. Employees must also sign the Educational Assistance Reimbursement Request and Repayment Agreement upon course(s) completion, accepting the terms and conditions for the repayment of reimbursed expenses each time the form is submitted. Failure to sign the form will result in a denial of eligibility for tuition reimbursement.

8. Educational reimbursement amounts are subject to IRS regulations. Amounts reimbursed to employees in excess of IRS regulations will be included in taxable income and subject to applicable taxes.

9. A list of eligible degrees is provided on HR Division's SharePoint. However, in order to qualify for educational assistance, there must be a direct correlation between the degree and the benefit to MoDOT. The degree declared must be one which can reasonably be expected to lead to improved department work performance, increase an employee's ability to assume further responsibilities within the department, further the department's tangible results, and/or provide new skills to an eligible inactive employee.

10. The course work must be taken at an accredited institution as listed by the U.S. Department of Education or the Council for Higher Education. A link is provided on HR Sharepoint for students to reference. It is the student's responsibility to make this determination prior to enrolling in classes.

11. No overtime will be earned for an "adjusted workday" unless the actual hours worked qualifies an employee for overtime pay as described in Personnel Policy 3000, "Working Hours and Overtime."

12. Reimbursement may be provided for the following:

A. Cost of test up to the department-approved rate relating to a Certificate of High School Equivalency diploma offered through the Missouri Department of Elementary and Secondary Education (DESE) or up to the department-approved rate for other accredited programs.

B. Employees will be allowed to take the exam three times through DESE at MoDOT's expense.

C. Course work at a vocational/technical school.

D. Graduate (master's degree) or undergraduate course work including correspondence courses through classroom, interactive television, videotape, computer, and other training sources as long as it is an accredited institution as listed by the U.S. Department of Education or the Council or Higher Education and meets requirements of item 9 above.

E. Courses to obtain post-graduate doctorate degrees will not be reimbursed.

13. Reimbursement for course(s) will be limited to 12 credit hours per calendar year. Any credit hours taken over that limit will not be eligible for reimbursement, and no extensions or waivers of that limit will be granted.

14. MoDOT will NOT reimburse for multiple degrees of the same level (only one associate's, one bachelor's, and one master's degree).

15. Reimbursement for grades of A, B, C, or "pass" (if course is graded pass/fail) will receive 75 percent reimbursement of the eligible amount. Grades D, F or "fail" (if course is graded pass/fail) are not be eligible for reimbursement.

Reimbursement will be granted at the rate of 75 percent of either the actual tuition cost per credit hour for the student at the school they are attending or 75 percent of the University of Missouri-Columbia (MU) per credit hour, whichever is lower.

A. For colleges/universities that are flat-rate tuition, the allowable reimbursement will be capped by converting the 12-hour annual maximum multiplied by 75 percent of the MU rate.

B. One College Level Examination Program (CLEP) test is equivalent to three credit hours.

C. Reimbursement for the cost of courses may be subject to withholding tax and, if so, will be reported on the employee's W-2 Form.

D. The net employee cost before reimbursement is determined by subtracting financial assistance from either the actual tuition cost or the University of Missouri rate for the credit hours earned, whichever is lower.

E. Reimbursement will be made per the procedures set forth in Procedure 6504, "Educational Assistance." The Educational Assistance Reimbursement Request and Repayment Agreement must be received by Central Office HR -Employment no later than 60 days after the completion of the course(s). Late submittals will not receive reimbursement and will not be waived.

16. Reimbursement will not be provided for the following:

A. Books, travel, meals, or other miscellaneous expenses.

B. Tuition exceeding the highest prevailing per credit hour tuition rate charged by the University of Missouri-Columbia.

C. Lab fees, activity fees, or miscellaneous fees.

D. Courses to obtain post-graduate doctorate degrees will not be reimbursed.

17. Repayment Provisions:

A. Subsequent to signing the Educational Assistance Reimbursement Request and Repayment Agreement, any employee who voluntarily or involuntarily terminates employment for any reason will be required to repay the department 100 percent of any tuition/educational reimbursement they received within the last 24 months from the employee's effective date of termination. Per the Educational Assistance Reimbursement Request and Repayment Agreement, the employee agrees to repay the department these monies and agrees the repayment amount must be fully paid to the department no later than 30 days after the effective termination date of employment.

B. The immediate supervisor, upon being notified of a voluntary or involuntary termination, must notify the local HR or support services representative to determine if repayment provisions will apply.

C. Upon being notified that he/she owes money to the department as outlined in this policy, the employee will be allowed a review period of no more than two business days to contest any or all of the repayment expense amounts owed. The department will provide the employee with documentation that supports the repayment expense amounts owed. The employee's review period of two business days will begin when the department provides the employee with the documentation outlined herein.

D. An employee may elect to make a personal payment to the department to repay all or a portion of the repayment amount owed the department instead of having money withheld

from his/her remaining paychecks and/or remaining annual or compensatory leave balances. However, if the employee requests to pay by personal payment, the payment must be received by the department by the end of the two-day review period. If the personal payment is not for the full repayment amount owed, the remaining amount owed will be withheld from the employee's remaining paychecks and/or remaining annual or compensatory leave balances.

E. If the full repayment amount owed is still not recovered by means of salary withholding and/or remaining leave balance withholding, the department may elect to establish a payment plan with the employee for the remaining amount owed.

F. If a payment plan is not entered into, or should an employee fail to comply with the established terms and conditions of the payment plan, the department may elect to pursue any/all lawful means to collect this repayment owed to the department.

G. Any expenses inadvertently reimbursed to an employee in excess of the stated amounts allowed in this policy, unless otherwise previously authorized in writing, may also be recovered from the employee by the department under the procedures outlined herein.

H. The Financial Services Division will coordinate the collection of employee repayment on behalf of the department.

CROSS REFERENCE

Personnel Policy 3000, "Working Hours and Overtime"

PROCEDURE

Procedure 6504, "Educational Assistance"

FORMS

Educational Assistance Reimbursement Request and Repayment Agreement (http://sharepoint/facilitation/HR/_layouts/WordViewer.aspx?id=/facilitation/HR/Documents/Educational%20Assistance/Educational%20Assistance%20Reimbursement%20Request%20and%20Repayment%20Agreement.doc.docx&Source=http%3a//sharepoint/facilitation/HR/Documents/Forms/AllItems.aspx?RootFolder%3D%252Ffacilitation%252FHR%252FDocuments%252FEducational%2520Assistance%26FolderCTID%3D0x01200014630FC9018F3B43AE719995749AA75F%26View%3D%7b215B4663-4DC3-47A8-8A14-05862E488E88%7d&DefaultItemOpen=1)

Educational Assistance Program Eligibility Checklist (http://sharepoint/facilitation/HR/_layouts/WordViewer.aspx?id=/facilitation/HR/Documents/Educational%20Assistance/Final%20Employee%20Approval%20Checklist%20%28mk%20version%29.docx&Source=http%3a//sharepoint/facilitation/HR/Documents/Forms/AllItems.aspx?RootFolder%3D%252Ffacilitation%252FHR%252FDocuments%252FEducational%2520Assistance%26FolderCTID%3D0x01200014630FC9018F3B43AE719995749AA75F%26View%3D%7b215B4663-4DC3-47A8-8A14-05862E488E88%7d&DefaultItemOpen=1)

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