Policy 6504

From Human Resources

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PERSONNEL POLICY MANUAL
MoDOT Personnel Policy Title: Educational Assistance **Policy Number**: 6504 **Chapter Title**: Training and Professional Development **Effective Date**: July 1, 2008 **Supersedes Policy Number** 6504 **Dated** March 1, 2007
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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 would also include an employee approved for, and 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 an advanced degree.

PROVISIONS/REQUIREMENTS

1. An active employee must meet all of the following criteria at the time of submitting his/her application to be eligible for the provisions of 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.

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

2. An inactive employee must meet all of the following criteria at the time of submitting his/her application to be eligible for the provisions of this personnel policy:

    a. Was approved for, and 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 who had successfully completed the department's initial six-month probationary period.

    c. Was in "good standing" (i.e. is rated successful or better on his/her most recent MAPS and is not on disciplinary probation, and has not received suspension or demotion within the last 12 months) when approved for work-related disability.

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. Employees must sign the acknowledgement on the P-53, "Application for Educational Assistance and Repayment Agreement" form (See "Forms" section of policy), accepting the terms and conditions for the repayment of reimbursed expenses. Failure to sign the acknowledgement will result in a denial of eligibility for tuition reimbursement.

5. Educational reimbursement amounts are subject to Internal Revenue Service (IRS) regulations. Amounts reimbursed to employees in excess of IRS regulations will be included in taxable income and subject to applicable taxes.

6. 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.

7. After working six months in a scheduled full-time work phase, co-op participants will be eligible for tuition reimbursement for those classes taken only during the work phase which are job related or part of the degree program. (Refer to Personnel Policy 6500, "Cooperative Educational Training Program.")

8. The employee should obtain approval from his/her supervisor for tuition reimbursement prior to beginning a course. The decision to grant reimbursement will be based on the needs of the district/division/office and budgetary funding available. Failure to obtain pre-approval may result in denial of reimbursement. The course/degree declared must be one which can reasonably be expected to lead to improved department work performance; increase an employee's ability to assume increased responsibilities within the department; meet the goals of the department's strategic plan; or provide new skills to an eligible inactive employee.

9. 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 human resources manager or support services manager must determine if the institution is accredited prior to an employee enrolling in a course.

10. 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."

11. 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.

12. Reimbursement may be provided for the following:

a. Cost of test up to the department approved rate relating to general education diploma (GED - high school equivalency) through the in-state program offered through the Missouri Department of Elementary and Secondary Education (DESE) or up to the department approved rate for other accredited programs. Employees will be allowed to take the exam three times through DESE at MoDOT's expense.

b. Course work at a vocational/technical school.

c. Graduate or undergraduate course work including correspondence courses through classroom, interactive television, videotape, computer, and other training sources.

13. Reimbursement will be based on the following:

		Undergraduate			**Graduate**		**Either**
Active Employee	**Credit Hours Per Calendar Year**	**"A"Grade**	**"B"Grade**	**"C/Pass"Grade**	**"A"Grade**	**"B/Pass"Grade**	**PASS a Pass/FailCourse or a CLEP Test**
Full Time Salaried	15	100%	75%	50%	100%	75%	100%
PermanentPart-Time(Works 75-99% - Average 30-39 hours per week)	11	100%	75%	50%	100%	75%	100%
	8	100%	75%	50%	100%	75%	100%

PermanentPart-Time(Works 50-74% -Average 20-29 hours per week)							

a. 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.

b. If an eligible active or inactive employee could not elect to take a pass/fail course for a grade, reimbursement for passing the pass/fail course will be at 100 percent.

c. One College Level Examination Program (CLEP) test is equivalent to three (3) credit hours.

d. The amount eligible for reimbursement will be calculated as follows:

The appropriate percentage rate will be multiplied times the net employee cost before reimbursement. The net employee cost before reimbursement is determined by subtracting financial assistance from the lower of either the actual tuition cost or the University of Missouri rate for the credit hours earned.

Employees are reimbursed the rate in effect at the time the course begins (beginning date as indicated on Form P-53, "Application for Educational Assistance and Repayment Agreement"). See "Forms" section of policy.

14. 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. No reimbursement will be made for pass/fail courses, which the eligible active or inactive employee has failed, for graded courses taken as an observer, or for graded courses for which the grade was under a "C" for undergraduate courses or under a "B" for graduate courses.

15. Repayment Provisions:

a. Subsequent to signing the Form P-53, any employee who voluntarily or involuntarily terminates employment for any reason will be required to repay the department 100% of any tuition/educational reimbursement they received within the last twenty-four (24) months from their effective date of termination. Per the Form P-53, the employee agrees to repay the department these monies and agrees the repayment amount must be fully paid to the department no later than thirty (30) days after the effective termination date of employment.

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

c. The employee, upon being notified that he/she owes money to the department under this policy, 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 by the employee to the department under this policy. 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 then 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 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 or 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 under this policy, unless otherwise previously authorized, may also be recovered from the employee by the department under the procedures outlined herein.

h. The Controller's Division will coordinate and handle the collection of employee repayment on behalf of the department.

CROSS REFERENCES

Personnel Policy 3000, "Working Hours and Overtime"

Personnel Policy 6500, "Cooperative Educational Training Program"

PROCEDURES

6504, Training and Professional Development (http://hrwiki/index.php/Procedure_6504)

FORMS

P-53, Application for Educational Assistance and Repayment Agreement (http://wwwi/intranet/hr/documents/P-53-ApplicationforEducationalAssistanceandRepaymentAgreement.doc)

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