

Tuition Reimbursement Instructions

Section 1 – Process to be followed by all employees eligible for Tuition Reimbursement
All steps in this process must be followed to be eligible for reimbursement.
Missing one or more steps in this process will delay your reimbursement and may cause your request to be denied all together.

Tuition reimbursement will be subject to the following conditions and will be paid in the following manner:

It is highly recommended that employees initiate the reimbursement request prior to enrolling in a course, to ensure availability of funds at the time of course completion.

1. Use the attached Tuition Reimbursement (T.R.) Form. Fill it out completely, and **attach** a copy of the course description or training agenda.
2. **Secure** department head signature on the form, certifying the coursework is job-related.
3. **Submit** the filled out T.R. Form to Risk Management for expenditure approval from the Human Resources Director.
4. The form will be returned to the person listed with either approval or denial of requested funds.
5. **Employees are responsible** for the safekeeping of the completed original form until it is time to turn it in for reimbursement.
6. **After finishing the course**, the employee fills out the form (if not already submitted), completes the “certification of successful course completion” and **submits** (within 4 weeks of the completion, or June 30th, whichever is sooner) the original T.R. Form to Risk Management with the following **attached**:
 - a. **A copy of your proof of payment**: cancelled check, bank statement with copy of check, credit card bill, invoice showing payment, or receipt for cash payment (cash payment receipts must be on letterhead from the organization or a preprinted receipt book with the organization’s name on it).
 - b. **A copy of proof of completion** with a “C” grade or better, a “Pass”, or certificate of successful completion. (It is best to find out ahead of time what kind of proof of completion will be provided, if you have questions about other options please email your questions to cfontes@co.slo.ca.us)
7. Risk Management will login the paperwork and submit it to the Auditor for payment to the employee.
8. Payment will be made as quickly as possible but we cannot guarantee when. Average time between submitting a *complete request for payment* and the payment being distributed is 4 weeks.

Section 2 – Specific information for BU’s 01, 02, 05, 13, 31, and 32.

Reimbursement is dependent upon bargaining unit and availability of funds. Please contact your payroll clerk or review “Benefits-at-a-glance” on the H.R. Department website, for the current education allowance amount for your bargaining unit and any additional details. As availability of funds allows, each San Luis Obispo County employee in Bargaining Units 01, 02, 05, 13, 31, and 32 is qualified to be reimbursed for fees, tuition, books or other required course materials for approved coursework completed each fiscal year (July 1- June 30).

Process for **TUITION REIMBURSEMENT**: follow the instructions in Section 1.

Section 3 – Specific information for BU’s 07, 08, 09, 10, 11, and 17.

Reimbursement is dependent upon bargaining unit and availability of funds. Please contact your payroll clerk or review “Benefits-at-a-glance” on the H.R. Department website, for the current education allowance amount for your bargaining unit. As availability of funds allows, each San Luis Obispo County employee in Bargaining Units 07, 08, 09, 10, 11, and 17 is qualified to be reimbursed for fees, tuition, books or other required course materials for approved coursework completed and/or professional membership reimbursement each fiscal year (July 1- June 30).

Process for **TUITION REIMBURSEMENT**: follow the instructions in Section 1.

Process for **PROFESSIONAL MEMBERSHIP REIMBURSEMENT**:

1. **Prior to making membership payment** to a professional organization, the employee must fill out the T.R Form completely and attach information about the professional organization.
2. **Secure** department head signature on the form, certifying the professional organization is job-related and that participation in the organization is designed to enhance the specific skills and/or professional understanding of the employee in the career series in which he/she is employed.
3. **Submit** the filled out T.R. Form to Risk Management for expenditure approval from the Human Resources Director.
4. The form will be returned to the person listed with either approval or denial of requested funds.
5. **Employees are responsible** for the safe keeping of the completed original form until it is time for reimbursement.
6. Once payment is made, the employee completes the “certification of payment” and **submits** the original T.R. Form to Risk Management with proof of payment (see Section 1, Item 6a).

Please remove this page before submitting the attached Tuition Reimbursement Form.