

Tuition Reimbursement Program

Introduction

The Tuition Reimbursement program at Appalachian State University is also known as Academic Assistance, Education Assistance, and Education Opportunities (formerly App State University Policy 603.4). In accordance with the Academic Assistance Policy outlined in the State Human Resources Manual, the tuition reimbursement program is for workforce planning and development. It provides a tool for managers and employees to support academic activities that directly relate to the employee's current or potential job duties. It may be used to maintain, enhance, or develop knowledge, skills, or abilities necessary for career development within the UNC System, or to achieve the university's mission, vision, and values. The tuition reimbursement program is not an employee benefit, right, or entitlement; it is a management program for workforce development.

Philosophy

The systematic and planned development of employee knowledge and skills is essential to effective University operations. Therefore, employees at Appalachian State University are encouraged to continue their education, job training, and professional development. In support of this, the Tuition Reimbursement program helps employees continue their education and learning.

Requests for tuition reimbursement may be initiated by the manager or the employee any of the following reasons:

- Coursework that is related to the employee's current job duties or potential job duties
 - Maintain, enhance, or develop knowledge, skills, or abilities for career development within the UNC System
 - Ensure employees have mandated licensure or certification only if the certification or license is obtained via academic coursework
 - Address a shortage of skilled workers in specific classifications
 - Develop a pool of employees for workforce planning, succession planning, and career development
 - Build specific high priority skills
 - Address performance expectations
 - Job-related degrees
 - Corresponding non-work-related courses within a degree program
 - Develop competencies directly related to maintaining or improving the employee's current job skills
 - Develop competencies outside the employee's current classification level to meet future work needs
 - Mandated by law or regulation as a job requirement for continued employment
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Policies

[Statutory Authority: G.S. 126-4](#)

[Administrative Rule: 25 NCAC 01K .0300](#)

[Ceiling Rates for 2023 - 2024](#)

Office of State Human Resources Policy Manual, [Academic Assistance Policy](#)

Office of State Human Resources Policy Manual, [Educational Leave Policy](#)

App State Tuition Reimbursement Policy



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Full-time and part-time (half-time or more) permanent, probationary, and time-limited employees are eligible for Tuition Reimbursement.

Probationary employees are eligible after the satisfactory performance for a period of not less than six months as determined by management.

Temporary and part-time (less than half-time) are not eligible.

Management may consider disciplinary action including active documented coaching, performance improvement plans, letters, or any other current disciplinary action for job performance or personal conduct prior to the approval of the application for reimbursement.

Denial of participation in the tuition reimbursement program cannot be grieved, except on grounds of discrimination.

Course Eligibility Policies are listed alphabetically below. A manager or employee may initiate a request to use the Tuition Reimbursement program to cover degree programs and courses, including corresponding non-work-related courses within a degree program, that directly relate to the employee's **current or potential** job duties. It may be used to maintain, enhance, or develop knowledge, skills, or abilities necessary for career development within the UNC System, or to achieve the university's mission, vision, and values.

Accreditation Requirement	Academic courses/degrees from accredited community colleges/colleges/ universities via traditional classroom, video-based, distance learning, web-based, eLearning, and certain correspondence courses are eligible for approval. Accreditation must be via an accrediting agency recognized by the US Department of Education. Correspondence courses not accredited by an accrediting agency recognized by the US Department of Education or the Council for Higher Education Accreditation for academic credit are not eligible under this policy.
Audited Courses	Academic courses which are audited are eligible for tuition reimbursement; however, an employee may be reimbursed for the same course or course equivalent only once, and the employee must provide satisfactory evidence that they attended at least 85% of the scheduled class meetings during the academic term.
Credit Hour Cap	Employees may take up to 20 credit hours, or 32 quarter hours per fiscal year of courses that provide academic credit per academic term.
Mandated Courses	When specific high-priority skill needs of the university prompt management to request an employee to take specific courses or degree programs the following shall apply: <ul style="list-style-type: none"> • All limitations under the provisions of this policy are waived. • Employees are still responsible for requirements for withholding taxes and FICA. • All expenses to the individual should be reimbursed related to acquiring the necessary course or degree, including travel costs; examinations and administrative fees; textbooks, and other course materials. (Any books or materials paid for by the university become the property of the university.)
Mandated Licensure or Certification	Tuition Reimbursement may be used to cover mandated licensure or certification only if obtained via academic coursework.
Masters/Doctoral Level Restrictions	Job-related thesis/dissertation research courses at the masters/doctoral level are restricted as follows: <ul style="list-style-type: none"> • All required written examinations for the degree shall be successfully completed before the course is approved. • A maximum of 15 hours of leave may be approved for each academic credit hour. • All leave hours shall be used during the academic term and may not be accumulated. • A maximum total of 9 academic credit hours are allowed for any one employee.
Origin of Request	The manager or the employee may request Tuition Reimbursement for degree programs and courses (including corresponding non-work-related courses within a degree program) that: <ul style="list-style-type: none"> • provide academic credit (as opposed to CEUs), • have a direct benefit to both the university and the employee, • benefit the employee in the completion of their current and/or potential job duties, and • are listed in the college/university course catalog, and charge tuition in the traditional meaning of tuition (as opposed to only registration fees).

Employees must use the [App State Tuition Reimbursement Application](#) to apply for tuition reimbursement.

Use of the Tuition Reimbursement program must be documented in the Development Goal section of the employee's annual performance plan. The performance appraisal of the development goal must document how the employee applied improved knowledge, skills, and abilities gained from the course on the job.

Managers are responsible for stewarding employee development in accordance with the University's non-discrimination policy and holding employees accountable for completing their required employment obligations. When an employee submits a [Tuition Reimbursement Application](#) to their manager for review, the manager should respond in a timely manner (e.g. within 2 business days). The manager should base their decision upon whether or not enrollment in the course will interfere with the satisfactory performance of the employee's normal employment obligations.

Approved course(s) for Tuition Reimbursement should be taken on the employee's own time whenever possible. If the course meets during the employee's regularly scheduled work hours the manager should work with the employee to adjust the work schedule to accommodate the course meeting times if doing so will not adversely affect department operations. However, if the work schedule cannot be adjusted or doing so will adversely affect department operations, the employee may request

- **MSA-Misc. Leave Administrative** through the established channel for leave request/reporting, or
- a leave of absence with or without pay in compliance with the Office of State Human Resources Policy Manual [Educational Leave Policy](#).

Reimbursement Policies are listed alphabetically below.

Academic Costs	Eligible employees approved for tuition reimbursement may be reimbursed for academic costs charged by the academic source at which the employee is enrolled. Academic costs are defined as charges assessed by an academic source to every person enrolling for the course. These charges are required of everyone and are neither negotiable nor discretionary for the individual enrolling in the course. Academic costs include in-state tuition, fees, and course/lab fees. Course/lab fees must always be itemized. Reimbursement of course/lab fees may require a written statement from the academic source justifying the fee as a required fee in addition to other fees.	
Amount of Reimbursement	Eligible employees may be reimbursed all academic costs charged by the academic source where enrolled, but not fees unrelated to registering for a course or a degree program, such as dorm, student union construction, athletic fees, student health service, cultural event fees, etc. as outlined below.	
	Academic Source	Reimbursable Amount
	University of North Carolina System Institutions and Institutions of the North Carolina Community College System	100% of academic costs for up to 20 credit hours per fiscal year.
	All other community colleges/colleges/universities accredited by an agency recognized by the US Department of Education	Up to the maximum academic cost charged by the UNC institutions for up to 20 credit hours or 32 quarter hours per fiscal year as determined by OSHR and published within 10 working days of the adjournment of the General Assembly and the meeting of the UNC Board of Governors to approve fees (see "Ceiling Rates"). Reimbursement of tuition and fees from outstate colleges/universities shall not exceed the amount as specified above.
Ceiling Rates	Tuition reimbursement ceiling rates are established and published by the Office of State Human Resources (OSHR) for each fiscal year. Ceiling rates apply to all educational institutions that are not University of North Carolina institutions or institutions of the North Carolina Community College System. Academic costs charged by institutions of the University of North Carolina and the North Carolina Community College System are 100% reimbursable if funds are available. The ceiling rates are based on the highest rate for tuition and fees charged by a University of North Carolina institution.	
Non-Reimbursable Expenses	Reimbursement shall not be made for: charges specifically related to processing or receiving continuing education units (CEUs); application, examination, and graduation fees; transportation costs; textbooks and supplies. Only academic-related fees should be considered for reimbursement. Fees unrelated to registration for a course or degree program such as student health services, dormitories, athletics, student unions, cultural events, etc. should be excluded.	
Other Financial Assistance	Financial assistance from any other financial aid program shall not be duplicated under this program. However, the difference, if any, between such aid and the allowable costs may be reimbursed.	
Reimbursement When an Employee Transfers or Separates	If an employee transfers to another State agency or university, and subsequently completes an approved course, the employee should submit a request for reimbursement to the employing agency/university. The employing agency/university is responsible for processing the request per the provisions of this policy and providing reimbursement if funds are available. Employees who separate from State service, except by reduction in force are not eligible for reimbursement.	
Requirement for Reimbursement	Requests for reimbursement should be submitted within 30 days of completion of the course or receipt of grade. The applicant shall receive reimbursement of approved academic costs upon submitting evidence of satisfactory completion of a preapproved course. Completion is defined as "Satisfactory," "Pass," or a grade of "C" or better for undergraduate courses, and a "B" or better for graduate courses. An "Incomplete" shall not be reimbursed until a final grade is issued.	
Special Graduate Programs	Graduate professional programs (e.g. medicine, veterinary medicine, business, etc.) with unusual course/lab fees, tuition or other fees.	

On January 1, 2013, Congress passed the American Taxpayer Relief Act that permanently extends employer-provided education assistance (Section 127 of the Internal Revenue Code). This allows an employee to exclude from income up to \$5,250 per year in educational assistance at the undergraduate and graduate levels.

Processes

The Tuition Reimbursement process is outlined in the table below. All parties should carefully review App State's Tuition Reimbursement Program policies and procedures to ensure their actions are compliant.

STAGE 1: APPLICATION	
Who...	Does What...
Employee	1) Meet with your manager to discuss the program/course(s) in which you wish to enroll to determine eligibility and the availability of department funds to cover the reimbursement. 2) Complete the Tuition Reimbursement Application and send it to your manager for review and approval.

Manager	<p>3) Document the intention to use the Tuition Reimbursement program in the Development Goal section of the employee's annual performance plan.</p> <p>4) Obtain necessary approval to use available department funds to cover the reimbursement.</p> <p>5) Upon receipt of the employee's Tuition Reimbursement Application, complete the Manager section and approve the course(s).</p> <p>6) Route the Tuition Reimbursement Application to your department budget manager for review and approval.</p>
Department Budget Manager	<p>7) Review the Tuition Reimbursement Application, complete the Department Budget Manager section, and approve the use of department funds to cover the reimbursement.</p> <p>8) Return the approved form to the employee.</p> <p>9) Encumber funds.</p>
Employee	<p>10) Register and pay for the preapproved course(s).</p>
STAGE 2: REQUEST FOR REIMBURSEMENT	
Who...	Does What...
Employee	Within 30 days of completing the course, submit the Request for Tuition Reimbursement , Tuition Reimbursement Application, original receipt, and grades to your department budget manager. (Application can be found under Dynamic Forms - My Forms linked in the top right corner).
Department Budget Manager	Upon receipt of the employee's approved Tuition Reimbursement Application, original receipt, and grades, initiate a direct-pay request to reimburse the employee from the encumbered and approved department funds.
Manager	Document how the employee applied improved knowledge, skills, and abilities on the job in the Development Goal section of their annual performance review in the Performance Management system.



IMPORTANT

Download the NEW [App State Tuition Reimbursement Application](#) NOT the [Application for Academic Assistance - PD 136](#) from the Office of State Human Resources; it is no longer being used at App State.

Procedures

- [Employee Procedures](#)
- [Manager Procedures](#)
- [Department Budget Manager Procedures](#)
- [What account codes do I use for Tuition Reimbursement?](#)

Frequently Asked Questions

- [Can I use Tuition Reimbursement for courses that are not related to my job?](#)
 - [How many courses may I use Tuition Reimbursement to cover?](#)
 - [Can I use Tuition Reimbursement to cover certificate courses?](#)
 - [Can I use Tuition Reimbursement for audited courses?](#)
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- [What account codes do I use for Tuition Reimbursement?](#)
 - [Can I file a grievance if my manager does not approve my request for Tuition Reimbursement?](#)
 - [What is the difference between the Tuition Waiver and Tuition Reimbursement Programs?](#)

Key Contacts

If you cannot find what you are looking for, use the **Write a Comment** box below to let us know!

The Tuition Reimbursement program is managed by the Learning and Organizational Development Team in the Office of Human Resources. Please direct questions and feedback to Alyson Ebaugh ebaugham@appstate.edu, or Tina Chaffin chaffinl@appstate.edu
