

Tuition Reimbursement Application

(for Seminars, Conferences, Conventions and non college-level courses of LESS than 3 weeks in length)

Form ER75-D, R. 06/09

RETURN APPLICATION TO:
 Training & Development Services
 Department of Employee Relations
 200 E. Wells Street, Room 706
 Milwaukee WI 53202-3554
 414.286.3650 / Fax: 414.286.0800
 Email: jkamme@milwaukee.gov
www.milwaukee.gov/der/TuitionBenefit

INSTRUCTIONS:

For ALL college-level courses, please use the ER-75 Form.

Complete application by hand (black ink only); do not use a pencil. Sign and attach a copy of a PAID RECEIPT.

APPLICANT INFORMATION

NAME:		(WORK): Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/>
DEPARTMENT:		Employee 6-digit I.D. #:

After your application is reviewed, you will receive an Approval Determination Letter via EMAIL. The letter will let you know on which paycheck the reimbursement will be added. **Please check one of the following:**

- I have neither a personal or work **Email** address; mail the letter to my home.
- Email** the Approval Determination Letter to the following **Email** address:

Please indicate (in the column below) whether each Seminar, Conference or Convention is related to your current position ("C") or to a promotional opportunity ("P") within City government. PLACE A CHECK MARK IN THE COLUMN BELOW IF YOU ATTENDED ON CITY TIME (not on your own time).

SEMINAR / CONFERENCE / CONVENTION TITLE	CITY TIME	"C" or "P"	START DATE (mo/day/year)	END DATE (mo/day/year)	COST
1)	<input type="checkbox"/>				\$
2)	<input type="checkbox"/>				\$
3)	<input type="checkbox"/>				\$
4)	<input type="checkbox"/>				\$

JUSTIFICATION: Explain how the Seminar, Conference, Convention or short course (non college-level) relates to your current position or to a reasonable promotional opportunity within City government:

If you attended on "City Time" and not on your own time **FORWARD** the completed and signed application to your Department/Agency Head for approval and signature.

- ✓ I have read the instructions and administrative guidelines and I agree to abide by them.
- ✓ I understand my Department/Agency Head and Employee Relations must approve this application.

PLEASE SIGN HERE:	Date:
--------------------------	--------------

DEPARTMENT/AGENCY HEAD SIGNATURE AND APPROVAL

➤ The courses are directly related to the applicant's present position or to a reasonable promotional opportunity within City government. Courses indicated taken "on City Time" are approved to be on City Time.

Dept/Agency Head Signature →	Date:
Supervisor's Initials (optional) →	Date:

THIS SECTION IS FOR EMPLOYEE RELATIONS' USE ONLY

Approved: _____	1)	\$
Disapproved: _____	2)	\$
Previous Reimbursement: \$	3)	\$
PAY CODE: 904	4)	\$
PAY DATE:	Total (#1-4): \$	

COMMENTS:

KEEP THIS PAGE FOR YOUR RECORDS. DO NOT ATTACH IT TO THE APPLICATION.

**REIMBURSEMENT INSTRUCTIONS for:
Seminars, Conferences and Conventions and Courses of less than 3 weeks in length.**

Please use this application (ER-75-D) to apply for reimbursement of seminars, conferences, conventions, that are less than three weeks in length.

- 1) If you attend a course that is **at least** 3 weeks **or more** in length, you need to complete version ER-75.
- 2) If you are applying for Membership Dues reimbursement, please use version ER75-A.
- 3) Please read the Administrative Guidelines.
- 4) Complete the APPLICANT INFORMATION section in full.
- 5) Attach a copy of a **PAID** receipt that shows the seminar, conference or convention fee has been paid, as well as the amount paid. Please do not submit originals, as they will not be returned to you.
- 6) If you are taking courses on "City time" and not on your own time, please forward the completed application, along with all necessary documentation **directly** to your Department/Agency Head for approval and signature. Please note that **not** all bargaining units are eligible to take courses on "City Time." **See NOTE #3 below.**
- 7) If you are taking the courses or seminars on your own time, please mail or fax (286-0800) the completed application, along with the necessary documentation directly to Training & Development Services, Room 706, City Hall.
- 8) **The applications are reviewed and processed in the order in which they are received. In general, you will receive the reimbursement within 8 weeks from the date Training & Development Services received your completed application and required documentation. The reimbursement is added to your regular payroll check and is non-taxable (the approval determination letter will have the check date on it).**

NOTE on receipts:

Whenever possible, copy all receipts unto one piece of paper (8½" x 11") separate from the application. Please see the Administrative Guidelines for more details on receipts.

WHAT THE TUITION BENEFIT DOES NOT COVER:

- Airfare
- Certification fees and renewals (*as of 1/1/05, general City management are eligible*)
- Courses where the tuition was paid for by a grant, scholarship or State/Federal veteran's benefits.
- Courses, seminars or conferences that began or were attended prior to City employment.
- Courses, seminars or conferences that began or were attended during an **unpaid** and/or voluntary leave of absence (i.e., voluntary layoff, educational leave of absence, etc.)
- Courses taken on "City" time (**see #3 below**)
- Equipment or supplies (i.e., calculators, disks, software, notebooks, paper, pencils, etc.) (**see #1 below**)
NOTE: The equipment and supplies must be REQUIRED in a successfully completed class (for those eligible to receive equipment and supply reimbursement).
- Fees such as: Examination, ID, Late, Parking, Transfer of Credit fees, application fees, etc.
- Finance charges, Interest Charges, Sales Tax
- License fees and renewals (*as of 1/1/05, general City management are eligible*)
- Lodging, Meals, Mileage
- Membership dues reimbursement (**see #2 below**)
- Part-time employees with less than 40 hours per pay period are **not** eligible for the Tuition Benefit.
- Shipping and handling charges
- Subscriptions to magazines, journals or periodicals (*this also applies to Membership Dues reimbursement*)
- Textbooks that were **NOT required** in a successfully completed course
- Union dues

NOTES:

1. Only certain bargaining units are eligible to receive reimbursement for **required** equipment and/or supplies for a successfully completed course.
2. Only certain bargaining units and employee groups are eligible for Membership Dues reimbursement.
3. Only certain bargaining units and employee groups are eligible to take courses on "City Time" provided the course or seminar is critical to and directly related to the employee's present position. **Unions that are NOT eligible to take courses on City time are: Milwaukee Police Association, Local 215 Firefighters, MB & CTC, Local 494-Fire Equipment Dispatchers, Local 510-Machinists & Fire Equipment Repairers.**

KEEP THIS PAGE FOR YOUR RECORDS. DO NOT ATTACH IT TO THE APPLICATION.

TUITION BENEFIT ADMINISTRATIVE GUIDELINES

- **"On City-Time" Use of Tuition Benefit:** Some unions and employee groups are eligible to take CRITICAL, JOB-RELATED COURSES on City-Time. Your Department/Agency Head and Employee Relations must approve courses. ALL other courses, seminars and conferences must be taken on the employee's own time. Please call 286-3387 with any questions. NOTE: ***Not all bargaining units are eligible to use the Tuition Benefit for "on City-time" courses.***
- **You must submit the application** and receipts within four (4) months of attending a seminar, conference, convention or short course.
- **Part-Time Employees:** Part-Time employees are eligible for prorated Tuition Benefit provided they work a minimum of 40 hours per pay period.
- **A valid, paid receipt is required** for ALL course, seminar, convention and, conference reimbursement requests.
- **Definition of an Acceptable Receipt:** Receipts MUST show that payment was made, as well as the amount paid. Examples of acceptable receipts include: cash register receipt, canceled check (copy of both sides required), money orders, credit card statements, or official receipts provided by the school or organization. Bank statements are only acceptable when accompanied by a copy of the front of the check or check carbon.
- **Unacceptable receipts include** invoices or registration forms requesting payment, receipts that show payment was made by another person, or receipts that are not legible.
- **Approval Determinations for Courses:** If you want to know in advance if a course will be approved for reimbursement, please call 286-3650 or 286-3387. Courses must be taken at accredited institutions, schools or organizations approved by Employee Relations. The reimbursement is based on courses taken during the calendar year (January - December) and is **always** applied to the year in which a course **begins**.
- **Grade Reports and Completion Statements:** For college courses, the minimum grade accepted as satisfactory completion is a final grade that represents the minimum grade point average required for a degree, diploma or certificate. "Mid-Term" grade reports are NOT acceptable. Conferences, conventions and seminars DO NOT require a grade report or completion statement.
- **Tuition Reimbursement Benefits Do Not Cover:** Non-required textbooks, union dues, finance charges, sales tax, licenses, certifications, examinations, shipping/handling charges, late and administrative fees, travel expenses (IE: lodging, meals, mileage), parking fees, magazine/journal/ periodical subscriptions, equipment or supplies. Certain bargaining units are eligible for REQUIRED equipment and supply reimbursement.
- **Seasonal Layoff and Unpaid Leaves of Absence:** If you have started a course prior to going on seasonal layoff or an unpaid leave of absence, you will receive your reimbursement check when you return to work. You must still send in the application, receipts and completion statements within eight weeks of the end of the course. However, if you start a course while on an unpaid, involuntary Leave of Absence or Layoff, you are not eligible to receive reimbursement.
- **Taxes:** ALL courses, seminars and conferences, and membership dues are **nontaxable**. The reimbursement is added to your gross total, but not to taxable earnings and NO withholdings will be taken.
- **Resignations from City Employment:** If you resign from City employment within six months of receiving a Tuition Benefit, that amount will be withheld from your final paycheck. This does not apply to those who retire, transfer to the School Board, or whose positions are eliminated due to budget cuts. You will not receive reimbursement for a class if you leave prior to completing it.