
Alameda-Contra Costa Transit District

Administrative Regulation No. 223A: Tuition Assistance Reimbursement Guidelines and Procedures

Issuing Officer: General Manager
Date of Adoption: 07/25/1986
Most Recent Amendment: 05/15/2017
(Implementation effective 7/1/2017)
See Also: 223

Subject Category: Section 200, Human Resources
Subsection: Benefits
Control Department(s): Human Resources

I. PURPOSE

The purpose of this Administrative Regulation is to provide procedures for individuals who wish to utilize their tuition assistance benefit.

II. PERSONS AFFECTED

Please refer to Board Policy 223 – Tuition Assistance Policy.

III. DEFINITIONS

“Reimbursement” means the amount that is paid to the employee to off-set the cost of fees associated in completing coursework.

“Repayment” means the obligation of the employee to repay the entire amount of the reimbursement benefit paid to them if they *voluntarily* separate from the District within 12 months of receiving the benefit.

“Fiscal Year” means July 1- June 30.

Please refer to Board Policy 223 for additional definitions.

IV. REGULATION

A. Justification for Coursework

Employee must provide a written justification for coursework to the Senior Administrator for Learning and Development, which must comply with the course eligibility requirements described in Board Policy 223.

B. Authorizations and Approvals

1. Employee must complete a Tuition Assistance Application/Repayment Obligation Agreement.
2. Employee must sign the application and send to the Senior Administrator for Learning and Development for review and final approval.

3. Employee is strongly encouraged to obtain approval for coursework **PRIOR** to enrollment. Should employee **not** obtain the required approvals prior to enrollment, there is no guarantee that they will receive reimbursement for their expenses.
4. Employee may appeal a denial of their tuition assistance benefit to the Executive Director of HR, who has discretion to overturn the denial.

C. Denial of Reimbursement

Employee may be denied reimbursement for failing to submit the appropriate documentation within the required timelines or for failing to provide proof of satisfactory completion of coursework. [See section F below for “proof of completion” requirements].

D. Eligible Expenses

Eligible expenses include, but are not limited to: (1) tuition; (2) required course books (3) required course software or online materials; (2) printed course materials in lieu of books; (4) registration fees; (5) lab fees; (6) non-resident fees; (7) matriculation fees; (8) examination and certification fees; (9) college preparatory and/or bridge classes; (10) tutoring fees; (11) official transcripts (12) college application fees.

E. Ineligible Expenses

Please refer to Board Policy 223 or the Tuition Assistance Application for a list of ineligible expenses.

F. Documentation

Employee must submit all required documents to the Senior Administrator for Learning and Development within 60 days of course completion. Below, is a list of the required documentation:

- Tuition Assistance Application/Repayment Obligation Agreement.
- Proof of payment – must include itemized expenses on receipt/s.
- Confirmation of Registration – must include employee’s name on the registration.
- Proof of completion - For graded courses, an unofficial transcript with employee’s name is acceptable and must show a grade of “C” or better or a “Pass.” For non-graded courses, a signed certificate of completion from the institution is acceptable.

G. Payment & Taxation

1. The Senior Administrator for Learning and Development will administer the payment request process to the Finance Department. Reimbursement will take approximately 1-2 pay periods after receipt of all required documents.
2. Approved reimbursements will be included (pre-tax) with the employee's regular paycheck.

3. Any tax ramifications for receiving tuition assistance shall be the responsibility of the employee. Employees are advised to consult a tax attorney or tax accountant for questions on taxation.

H. Re-payment Obligation

1. Employee must agree that if he or she voluntarily leaves the District, the employee will repay the full amount (100%) of any tuition reimbursements received during the twelve month period preceding the employee's separation date.
2. To the extent allowed by law, the District may deduct the amount of any Tuition Repayment Obligation from any compensation due and owing to Employee at time of separation from employment. The District may withhold from your final paycheck (including base salary, bonuses, vacation pay and/or expense reimbursements), monies, up to the amount due to the District.

I. No Guarantee of Employment or Promotion.

Completion of coursework is no guarantee for promotion to the employee for any specific classification, period of time, or duration.

J. Termination:

Employee ceases to be eligible for tuition assistance upon notice of termination of employment. No reimbursements will be made to former employees or employees who have given notice of resignation. An employee whose job is eliminated and who is eligible for severance is ineligible for reimbursement for courses enrolled in after he or she has received notice of job elimination.

Approved by:



Michael A. Hursh, General Manager
Alameda-Contra Costa Transit District