



**State of Oklahoma  
Human Capital Management Division  
Office of Management and Enterprise Services  
Policies and Procedures  
Education Assistance Program**

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<b>Effective Date of Policy: 01/04/2015</b>	<b>Next Scheduled Review: 11/01/2017</b>
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<b>Approved: Lucinda Meltabarger, as Designee of OMES Director Preston Doerflinger</b>	<b>Approval Date: 01/04/2016</b>

### **Policy**

The Education Assistance Program is provided for employees of the Office of Management and Enterprise Services (OMES) who have been classified as full-time OMES employees for at least one year. Educational benefits will apply only (1) to courses eligible for college credit that are within the employee's field of work, (2) to courses that are a prerequisite to obtaining certifications related to the employee's field of work, (3) to coursework providing an opportunity for furthering the employee's education which will improve skills directly applicable to job responsibilities and approved by the Division Director and the Director of Human Resources.

### **Tuition Reimbursement**

Employees requesting to participate in the program must submit a completed Education Assistance Application Form by March 1 for consideration for the next fiscal year funding cycle. In addition to the Education Assistance Application Form, employees must also submit a copy of their degree sheet, cover letter outlining the importance of the education for their current or future position, and a copy of their most recent PMP. Employees should not enroll until OMES approves the request for assistance, unless the employee is prepared to pay out of pocket. To request a reimbursement, employees must provide documentation from their university or college on the courses completed, credit hours earned, tuition charges, proof of payment and/or proof of payment plan and final grade received no later than 90 days after course

completion. No reimbursements will be granted for requests submitted after the 90-day period. The documentation shall be placed in the employee's HR file.

Upon successful completion of the approved course(s) and submission of required documentation within designated timeframes, employees will be reimbursed as follows:

For course work resulting in a final grade of "A" or "B", 100% of the amount equivalent to the resident tuition for course work at an accredited college or university.

For courses in which letter grades are not given, work resulting in certification or satisfactory completion, e.g. "P" or "S", 75% of the amount equivalent to the resident tuition for course work at an accredited college or university.

### **Program and Eligibility Requirements**

It is understood that an employee's enrollment in a course is for the benefit of both the employee and the Office of Management and Enterprise Services. Only courses that are directly related to job performance will be approved.

Reimbursement will be limited to programs reviewed and approved in writing by the appropriate Division Director and the Director of Human Resources prior to the employee's enrollment.

Reimbursement will be limited to 18 credit hours (or the equivalent in the Career Tech System) or \$5,000 in a calendar year whichever comes first. The payment date determines to which calendar year the reimbursement is applied. Reimbursement is subject to a \$15,000.00 lifetime career benefit cap.

Unless special circumstances warrant, only classes scheduled during non-working hours will be approved for reimbursement. Documentation of the special circumstances shall be placed in the employee's personnel file along with other documentation required for tuition reimbursement.

Employees obtaining reimbursement for tuition are responsible for determining whether or not the reimbursement is reportable and taxable on their individual tax returns.

Employees eligible to receive scholarships or fee waivers through other governmental or private programs should avail themselves of those programs prior to applying for the Office of Management and Enterprise Services Education Assistance Program. In no case shall total awards from all sources exceed 100% of the cost of enrollment.

The lifetime career benefit of \$15,000 and the total amount of tuition reimbursement shall not exceed funds set aside for this purpose in the budget and shall be reviewed and approved on an annual basis.

Former employees are not eligible for reimbursement regardless of their active status at the time the class was taken.

Employees who elect to take courses and receive tuition assistance must continue to meet the full responsibilities of their positions. Courses must not interfere with availability for scheduled work or negatively affect work performance.

Employees making application must have received an overall rating of “meets” or “exceeds standards” on his/her current performance appraisal.

Employees must not have received any formal discipline (i.e., written memo to employee) within one year of making application to the program.