

TECHNICAL ASSISTANCE

Date: April 13, 2023
Contact: DWDHumanResources@dwd.in.gov
Program: Indiana Department of Workforce Development (DWD)
Subject: DWD Technical Assistance 2022-11
DWD Employee Education Reimbursement and Tuition Assistance Programs

Purpose

The purpose of this technical assistance is to outline and clarify the process of submission and approval for education reimbursement and tuition assistance requests from Department of Workforce Development (DWD) employees, consistent with the Indiana State Personnel Department (SPD) policy on Education Reimbursement.

Rescission

DWD Technical Assistance 2021-17 *Education Reimbursement*

References

SPD Policy *Education Reimbursement*¹

Content

As required by SPD's policy, the education reimbursement and tuition assistance processes are employee-driven. Employees who wish to take advantage of these programs are responsible for complying with all guidelines and procedures set forth in SPD's Education Reimbursement Policy and this technical assistance.

Regardless of program being pursued, employees are urged to consult with their formal supervisor to determine if the course(s) and associated costs will be eligible for reimbursement or tuition assistance prior to course enrollment or program application.

Employee Eligibility

An employee who meets the following criteria is eligible for these programs:

¹ The policy can be accessed at <https://www.in.gov/spd/files/Education-Reimbursement-Policy.pdf>.

- The employee must have been employed full time continuously with the state for at least 12 months prior to application submission; and
- The employee must not have received a disciplinary action in the one year prior to the end of the course.

Maximum Annual Amount

The maximum amount of education reimbursement or tuition assistance per employee per calendar year² is \$5,250. Employees may access both programs within a calendar year, but the combined total annual amount may not exceed \$5,250. *Table I* provides an example of how an employee may utilize both programs within a calendar year.

Table I

	Spring Semester	Summer Session	Fall Semester	Total
Education Reimbursement	\$3000	\$500		\$3500
Tuition Assistance			\$1750	\$1750
Maximum Total				\$5250

The following funds **must be deducted** from the total amount requested for reimbursement prior to consideration for payment, except as required by federal law or regulation:

- Scholarship awards
- Grant funding
- Financial assistance (including any applicable employee discounts)

These funds can be applied first to non-eligible courses taken concurrently with the eligible courses at the same institution before being deducted from the total amount requested for reimbursement.

Student loans (including Perkins and Stafford loans) **do not need to be deducted** from the total amount requested for reimbursement.

Eligible Educational Institutions

Education Reimbursement

Any accredited training or educational institution, school, or professional organization.

Tuition Assistance

Ivy Tech Community College (Ivy Tech)

Eligible Courses and Cost Limitations

Eligible Courses

Eligible courses include all core and elective courses required for completion of a certificate, state licensure, associate’s, bachelor’s, master’s, or doctoral degree program. This includes credit/no credit or

² Based on calendar year (January 1st through December 31st).

pass/fail courses, refresher courses, or preparatory course work for licensure or certification when required for the completion of the program.

Eligible Costs

Eligible costs are limited to tuition and required course fees.

Ineligible Costs³

Costs that are **not** eligible include any fees or other expenses not specifically for tuition or course fees; these may include, but are not limited to the following:

- Application and enrollment fees
- Transcript fees
- Textbooks and other course materials, whether physical or electronic
- Pens, notebooks, pencils, and other office or school supplies
- Personal computers or other electronic devices
- Entrance exams or preparatory classes for an entrance exam (e.g., LSAT, GMAT, GRE, etc.)
- Fees for licensure or licensure exams
- Parking
- Late fees, fines, penalties, bank charges
- Equipment rental or charges
- Room and board

Successful Course Completion

Successful completion of a course means receiving a satisfactory grade of at least a “C” or above (or an equivalent “pass” grade).

After the employee successfully completes a course, they are responsible for providing all required information and documentation, as outlined in **Attachment B** for reimbursement or **Attachment C** for tuition assistance. A course is considered complete as of the date that official notice of the final grade is provided to DWD.

Employee and Agency Responsibilities Overview

The responsibilities listed below are a general overview. Employees and formal supervisors should carefully review **Attachment B** and **Attachment C** for detailed process instructions and documentation requirements for each program.

DWD Employee

The responsibilities of DWD employees seeking education reimbursement or tuition assistance include, but are not limited to, the following:

- Completion and submission of the appropriate program application:⁴

³ Agency or employee association fees, membership dues, or licensure expenses that may not be eligible under SPD policy may be eligible for reimbursement under the State Budget Agency’s FMC 1.1.

⁴ Program applications can be accessed at <https://www.in.gov/spd/files/Education-Reimbursement-Policy.pdf>.

- Education Reimbursement Program Application, State Form 53045, which must be submitted **at least 30** calendar days **prior** to the **end** of the course; or
- Tuition Assistance Program Application, State Form 56530, which must be submitted **at least 30** days **prior** to **start** date of the course.⁵
- Successful completion of the course with a satisfactory grade of at least a “C” or above or an equivalent “pass” grade;
 - Employees who fail to achieve a grade of “C” or higher (or an equivalent “pass” grade), the receipt of a certificate of satisfactory completion when no grade may be given, or who have exhausted the \$5,250.00 per calendar year allotment for tuition assistance and/or reimbursement will be responsible for the full cost of the course.
- Submission of all required documentation and information as outlined in **Attachment B** or **Attachment C**; and
- Respond to all requests for additional information as needed to process program applications.

DWD Formal Supervisors

Formal supervisor responsibilities include, but are not limited to, the following:

- Work with both the employee and DWD HR throughout the reimbursement or tuition assistance process.
- Assist employees with obtaining course eligibility verification and/or application completion, if requested; and
- Submitting all required documentation and employee information to DWD HR.

DWD Human Resources (DWD HR)

DWD HR responsibilities include, but are not limited to, the following:

- Managing application approvals; and
- Submitting all required documents to DWD Finance for processing.

DWD Finance

DWD Finance responsibilities include, but are not limited to, the following:

- In the PeopleSoft Financials system, properly document the use of funds for this purpose in accordance with standards established by the State Budget Agency;
- Code expenses using the appropriate account; and
- Ensure that payment, if appropriate, is issued as soon as practicable after required program documentation is provided.

Attachments

Attachment A - Education Reimbursement and Tuition Assistance Programs: Side-by-Side Comparison

Attachment B - Education Reimbursement Program Step-by-Step Process

Attachment C - Tuition Assistance Program Step-by-Step Process

Attachment D - Ivy Tech Achieve Your Degree (AYD) Program

⁵ NOTE: a modification in coursework or initial application constitutes a new request and may be reviewed again for a determination. The employee must notify their formal supervisor of any changes.

Additional Information

Questions regarding this publication should be directed to DWDHumanResources@dwd.in.gov.

Attachment A
Education Reimbursement and Tuition Assistance Programs:
Side-by-Side Requirements Comparison⁶

Requirement	Education Reimbursement	Tuition Assistance
DWD Employee Eligibility Criteria	Identical	Identical
Application	53045 Education Reimbursement Application	56530 Tuition Assistance Application
Maximum Annual ⁷ Amount	Identical	Identical
Timing of Application Submission	Application and required documentation must be submitted at least 30 calendar days prior to the end of the course(s).	Application must be submitted at least 30 calendar days prior to the start date of the course(s).
Documentation Required at Application	<ul style="list-style-type: none"> • State Form #53045 • Course schedule; and • Itemized tuition and course fees (account statement). 	State Form 56530
Payment Recipient	Employee	Educational Institution
Payment Processing	Begins when DWD receives required paperwork from the employee.	Begins when DWD receives required paperwork from the employee AND the training institution.
Eligible Training Institutions	Any accredited training or educational institution, school, or professional organization.	Ivy Tech
Eligible Courses	Identical	Identical
Eligible Costs	Identical	Identical
Ineligible Costs	Identical	Identical
Successful Course Completion ⁸	Identical	Identical
Required Course Completion Documentation and Employee Information	Identical	Identical

⁶ Highlighted fields indicate there are different program requirements.

⁷ Based on calendar year (January 1st through December 31st).

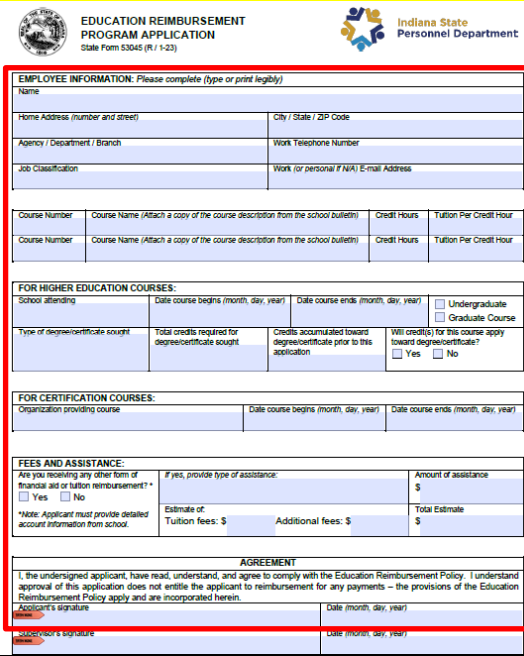
⁸ Successful completion of a course means receiving a satisfactory grade of at least a “C” or above (or an equivalent “pass” grade).

Attachment B Education Reimbursement Program Step-by-Step Process

Employee responsibilities are highlighted yellow
Formal Supervisor responsibilities are highlighted blue
DWD HR/Agency Designee responsibilities are highlighted green.
DWD Finance responsibilities are highlighted in purple.


Step #	Employee
1	Prior to course enrollment, employees should consult with their formal supervisor to discuss proposed course content to determine course eligibility for reimbursement.
2	Once verified, the employee may enroll in and begin working on course content. ⁹

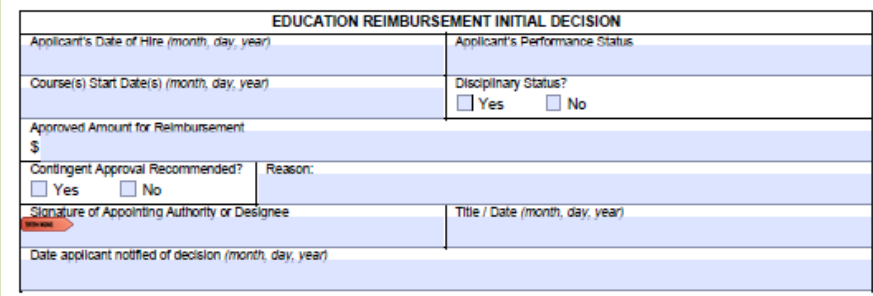
Step #	Formal Supervisor
1	If requested, assist employee with course eligibility verification.

Step #	Employee
3	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>At least 30 calendar days prior to the end of the course(s), the employee must complete page 1 of the Education Reimbursement Program Application (State Form #53045),¹⁰ sign, and date.</p> </div> <div style="width: 45%; border: 1px solid black; padding: 5px;">  </div> </div>
4	<p>Submit the following to your supervisor:</p> <ul style="list-style-type: none"> Education Reimbursement Program Application; Course schedule; and Itemized tuition and course fees (account statement).

⁹ NOTE: Courses dropped after an official “drop/add” date are not eligible for reimbursement. No education reimbursement will be provided if a course is taken more than once, or an employee takes another attempt at a course previously paid for by the State.

¹⁰ Program applications can be accessed at <https://www.in.gov/spd/files/Education-Reimbursement-Policy.pdf>.

Step #	Formal Supervisor
2	<p>You should receive the signed Education Reimbursement Program Application with page 1 completed, a course schedule, and an account statement from the employee. Review, verify for accuracy, and sign/date page 1 of the application.</p> 
3	Submit the signed application and employee documentation to DWD HR. ¹¹

Step #	DWD HR/Agency Designee
1	<p>DWD HR will work with appropriate Agency Designee to complete the following:</p> 
2	Following the initial decision, HR/Agency Designee will notify the eligible employee of the decision and provide them with a copy of the signed application for their records.

Step #	Employee
5	Complete the course with a satisfactory grade of at least a "C" or above or an equivalent "pass" grade.
6	<p>Email the following documents to your formal supervisor:</p> <ul style="list-style-type: none"> • Application with initial decision signature; • Proof of successful course completion; • Itemized tuition and course fees (account statement);¹² • Proof of payment; and • Completed supplier (vendor) forms: <ul style="list-style-type: none"> ○ Request for Taxpayer Identification Number and Certification (IRS Form W-9);¹³ and ○ Automated Direct Deposit Authorization Agreement (State Form #47551).¹⁴ <p>The email body must contain the following information:¹⁵</p> <ul style="list-style-type: none"> • Name and Peoplesoft ID #; and • PeopleSoft Department Number <p>Maintain a copy of the documents for your records.</p>

¹¹ DWDHumanResources@dwd.in.gov

¹² Account statement must have a zero (\$0.00) balance.

¹³ <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

¹⁴ <https://forms.in.gov/Download.aspx?id=11695>.

¹⁵ Seek assistance from your formal supervisor if you are unsure of the correct number/codes.

Step #	Formal Supervisor
4	Review employee tuition assistance documentation and email content for accuracy. (See the Employee section above for requirements)
5	Email the application, employee documents, and employee information to DWD HR. ¹⁶

Step #	DWD HR/Agency Designee																				
3	<p>DWD HR will work with appropriate Agency Designee to complete the following:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th colspan="2">FINAL APPROVAL FOR REIMBURSEMENT FOLLOWING COURSE COMPLETION</th> </tr> </thead> <tbody> <tr> <td>Applicant's Date of Hire (month, day, year)</td> <td>Applicant's Employment Status</td> </tr> <tr> <td>Course(s) End Date(s) (month, day, year)</td> <td>Disciplinary Status? <input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>Grade(s) Earned</td> <td>Approved amount for reimbursement \$</td> </tr> <tr> <td>Course Completion Information Received: <input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td>Eligible for Reimbursement: <input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td colspan="2">Reason:</td> </tr> <tr> <td>Reimbursement Distribution Date (month, day, year)</td> <td>Total Amount Distributed this calendar year (not to exceed \$5,250.00) \$</td> </tr> <tr> <td colspan="2">Signature of Appointing Authority or Designee</td> </tr> <tr> <td colspan="2">Signature of Agency Finance Director</td> </tr> <tr> <td colspan="2">Title / Date (month, day, year)</td> </tr> </tbody> </table>	FINAL APPROVAL FOR REIMBURSEMENT FOLLOWING COURSE COMPLETION		Applicant's Date of Hire (month, day, year)	Applicant's Employment Status	Course(s) End Date(s) (month, day, year)	Disciplinary Status? <input type="checkbox"/> Yes <input type="checkbox"/> No	Grade(s) Earned	Approved amount for reimbursement \$	Course Completion Information Received: <input type="checkbox"/> Yes <input type="checkbox"/> No	Eligible for Reimbursement: <input type="checkbox"/> Yes <input type="checkbox"/> No	Reason:		Reimbursement Distribution Date (month, day, year)	Total Amount Distributed this calendar year (not to exceed \$5,250.00) \$	Signature of Appointing Authority or Designee		Signature of Agency Finance Director		Title / Date (month, day, year)	
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4	DWD HR will email the completed application, employee documents, and employee information to DWD Finance for processing.																				

Step #	DWD Finance
1	DWD Finance will process the reimbursement for payment directly to the employee upon receipt of all required documentation.

¹⁶ DWDHumanResources@dwd.in.gov.

Attachment C Tuition Assistance Program Step-by-Step Process

Employee responsibilities are highlighted yellow
Formal Supervisor responsibilities are highlighted blue
DWD HR/Agency Designee responsibilities are highlighted green.
DWD Finance responsibilities are highlighted in purple.

Step #	Employee
1	Prior to course enrollment, employees should consult with their formal supervisor to discuss proposed course content to determine course eligibility for tuition assistance.

Step #	Formal Supervisor
1	If requested, assist employee with course eligibility verification and application completion.

Step #	Employee
2	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>At least 30 calendar days prior to the start date of the course(s), the employee must complete page 1 of the Education Tuition Assistance Application (State Form 56530).¹⁷</p> <p>The employee must also sign/date the application and submit it to their formal supervisor.</p> </div> <div style="width: 50%; border: 1px solid black; padding: 5px;"> <div style="text-align: right; float: right;">Reset Form</div> <div style="text-align: center;"> <p>TUITION ASSISTANCE PROGRAM APPLICATION State Form 56530 (11-22) STATE PERSONNEL DEPARTMENT</p> <p><small>Employee: Please complete (type or print legibly).</small></p> </div> <div style="border: 2px solid red; padding: 5px;"> <p style="text-align: center; margin: 0;">EMPLOYEE INFORMATION</p> <p>Name _____</p> <p>Home Address (number and street, city, state, and ZIP code) _____</p> <p>Agency / Department / Branch _____ Work Telephone Number _____</p> <p>Job Classification _____ Work E-mail Address (or personal if not applicable) _____</p> <p style="text-align: center; margin: 0;">REASON FOR PARTICIPATION IN PROGRAM</p> <p>Briefly explain how the course(s) you selected will provide you with skills, knowledge, and training.</p> <p style="text-align: center; margin: 0;">HIGHER EDUCATION COURSES</p> <p>Name of School _____ Type of Degree / Certificate _____</p> <p>Date Courses Begin (month, day, year) _____ Date Courses End (month, day, year) _____</p> <p>Total Credits Required for Degree / Certificate _____ Credits Accumulated Toward Degree / Certificate Prior to this Application _____</p> <p style="text-align: center; margin: 0;">FEES AND ASSISTANCE</p> <p>Are you receiving any other form of financial aid or tuition reimbursement? <input type="checkbox"/> Yes <input type="checkbox"/> No Estimated Tuition Fees \$ _____</p> <p>If yes, provide type of assistance: _____ Estimated Additional Fees \$ _____</p> <p>Amount of Assistance \$ _____ Total Estimated Fees \$ _____</p> <p style="text-align: center; margin: 0;">AGREEMENT</p> <p>I, the undersigned applicant, have read, understand, and agree to comply with the Education Reimbursement Policy. I understand approval of this application does not entitle the applicant to tuition assistance for any payments—the provisions of the Education Reimbursement Policy apply and are incorporated herein. I also agree if I separate employment from the State for any reason within twelve (12) months of the completion of the course for which tuition assistance is made, I must immediately repay the State for any tuition assistance amounts received as a result of this application.</p> <p>Applicant Signature _____ Date (month, day, year) _____</p> <p>Supervisor Signature _____ Date (month, day, year) _____</p> </div> </div> </div>

Step #	Formal Supervisor
2	<p>You should receive the signed Tuition Assistance Program Application (page 1). Review, verify for accuracy, and sign/date the application.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;"> <p style="text-align: center; margin: 0;">AGREEMENT</p> <p>I, the undersigned applicant, have read, understand, and agree to comply with the Education Reimbursement Policy. I understand approval of this application does not entitle the applicant to tuition assistance for any payments—the provisions of the Education Reimbursement Policy apply and are incorporated herein. I also agree if I separate employment from the State for any reason within twelve (12) months of the completion of the course for which tuition assistance is made, I must immediately repay the State for any tuition assistance amounts received as a result of this application.</p> <p>Applicant Signature _____ Date (month, day, year) _____</p> <div style="border: 2px solid red; padding: 2px;"> <p>Supervisor Signature _____ Date (month, day, year) _____</p> </div> </div>
3	Submit the application to DWD HR. ¹⁸

¹⁷ Program applications can be accessed at <https://www.in.gov/spd/files/Education-Reimbursement-Policy.pdf>.

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2	Following the initial decision, HR/Agency Designee will notify the eligible employee of the decision and provide them with a copy of the signed application for their records.																								

Step #	Employee
3	Upon receiving the signed application, the employee should then follow the educational institution's procedure for course application. ¹⁹
4	Complete the course with a satisfactory grade of at least a "C" or above or an equivalent "pass" grade.
5	<p>Email the following documents to your formal supervisor:</p> <ul style="list-style-type: none"> • Application with initial decision signature; • Proof of successful course completion; and • Completed supplier (vendor) forms: <ul style="list-style-type: none"> ○ Request for Taxpayer Identification Number and Certification (IRS Form W-9);²⁰ and ○ Automated Direct Deposit Authorization Agreement (State Form #47551).²¹ <p>The email body must contain the following information:²²</p> <ul style="list-style-type: none"> • Name and Peoplesoft ID #; and • PeopleSoft Department Number <p>Maintain a copy of the documents for your records.</p>

Step #	Formal Supervisor
4	Review employee tuition assistance documentation and email content for accuracy. (See the Employee section above for requirements)
5	Email the application, employee documents, and employee information to DWD HR. ²³

¹⁹ NOTE: Courses dropped after an official "drop/add" date are not eligible for tuition assistance. No tuition assistance will be provided if a course is taken more than once, or an employee takes another attempt at a course previously paid for by the State.

²⁰ <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

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4	DWD HR will email the completed application, employee documents, and employee information to DWD Finance for processing.																								

Step #	DWD Finance
1	<p>DWD Finance will pay the balance due directly to the educational institution upon receipt of the following documents from the education institution:</p> <ul style="list-style-type: none"> <li data-bbox="386 869 1425 961">(i) Official documentation for completion of the course with a grade of “C” or higher (or an equivalent “pass” grade), or the receipt of a certificate of satisfactory completion when no grade may be given by the educational institution, and <li data-bbox="386 968 1187 995">(ii) An invoice reflecting the amount due for the completed course(s)

Attachment D

Ivy Tech Achieve Your Degree (AYD) Program

The Achieve Your Degree Program is a partnership between Ivy Tech Community College and community businesses and institutions (including the Indiana State Government) to offer employees the opportunity to receive a community college education at minimal cost.

Achieve Your Degree Benefits:

- Financial barriers are removed for students wishing to further their education through the tuition deferral and financial aid process.
- Uniquely designed Career Certificates, which are embedded within Technical Certificates and Associate degrees, as well as the Transfer as a Junior programs (officially known as Transfer Single Articulation Pathway (TSAP) degrees), provide professional and career pathways within companies at a reduced cost to the employer.
- Opportunities for transfer to four-year institutions via Transfer as a Junior programs are a more cost-effective use of limited company tuition benefit dollars and can replace internal professional development training.
- Employers and community institutions can develop higher skilled employees from within which reduces turnover, fosters company loyalty, and increases the community value of this program.
- Employees developed through the Achieve Your Degree program become more involved in the surrounding community and are more loyal to their organizations.

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