

## Tuition Reimbursement Request for Faculty Members

### Part I. FACULTY MEMBERS INFORMATION

Employee Name \_\_\_\_\_ Email Address \_\_\_\_\_  
 Percentage Employed \_\_\_\_\_ Employee # \_\_\_\_\_  
 Employee Job Title \_\_\_\_\_ Home Phone \_\_\_\_\_  
 Department and Mail Code \_\_\_\_\_ Work Phone \_\_\_\_\_  
 FOAPAL Coding \_\_\_\_\_

Note: Reimbursement is limited to courses for which the faculty member has identified an appropriate funding source that is within his/her control and confirmed with the department chair that these funds can be used at the faculty member's discretion.

For HR Use Only:

### Part II. COURSE INFORMATION

Year \_\_\_\_\_ Semester: Fall \_\_\_ Spring \_\_\_ Summer \_\_\_

Institution Offering Course \_\_\_\_\_ include signed exception statement if outside Connecticut

Applications must be submitted to Human Resources, MC 4035, at least one week prior to the beginning of classes.

Graduate Level Courses Name and Section # \_\_\_\_\_

Total Credit Hours \_\_\_\_\_ Cost Per Credit Hour \_\_\_\_\_

Total Tuition Cost \_\_\_\_\_ Begin and End Class Dates \_\_\_\_\_

Note: Reimbursement will be considered only if the department chair signs and dates Part V prior to the start of the course

### Part III. JOB RELATED

In order for reimbursement to be approved, each course must result in increased knowledge and skill. Additionally, there is a reasonable expectation that the UConn Health will benefit from participation in this program (i.e. the course work will be applied to carrying out the mission of UConn Health.)

Are the course/s job-related according to the definition above? \_\_\_ YES \_\_\_ NO

If No, reimbursement cannot be granted. If YES is selected, explain briefly:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Part IV. TAX REPORTING REQUIREMENTS FOR GRADUATE LEVEL COURSES**

Tuition assistance received for graduate level courses may be taxable if the courses exceed \$5,250 per calendar year and are not job-related per the Internal Revenue Code definition below.

Job-Related Test: If the two part job-related test is satisfied and documented, graduate level courses taken by employees qualify for exclusion from income. Acceptable documentation would include the employee's supervisor signing section V stating that s/he agrees with the employee's certification that the course is job-related.

The job-related tests are not satisfied unless BOTH of the following tests are met.

FIRST, the educational assistance MUST MEET ONE of the following requirements:

- a. The education must maintain or improve skills required by the employee in his/her job.
- b. The education must meet the express requirements of the University imposed as a condition of retaining the job. Please note, the requirement must have a bona fide business purpose, and only the minimum education necessary for retention of employment, status or salary may be considered as undertaken to meet the employer's requirement.

SECOND, the educational assistance MUST MEET BOTH of the following requirements:

- a. The education cannot constitute a minimum educational requirement to qualify for obtaining employment.
- b. The education cannot lead to qualifying the individual for a new trade or business. Please note, a change in duties does not constitute a new trade or business if the new duties involve the same general work as is involved in the employee's present work.

**If YES is selected, explain briefly:**

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**Part V. CERTIFICATION BY DEPARTMENT CHAIR**

I agree with the employee's representation of whether or not the course is job related in both sections above:

Part III \_\_\_\_ Yes \_\_\_\_ No      Part IV \_\_\_\_ Yes \_\_\_\_ No

I authorize the FOAPAL coding identified in Part I to be used for tuition reimbursement. \_\_\_\_ Yes \_\_\_\_ No

Department Chair Printed Name and Signature \_\_\_\_\_ Date \_\_\_\_\_

Note: Reimbursement will be considered only if the department chair signs and dates Part V prior to the start of the course.

**Part VI. REIMBURSEMENT PROCESSING INSTRUCTIONS**

Upon obtaining the Department Chair's signature prior to the start of the course, forward the tuition reimbursement application to Human Resources (MC 4035 or fax # 860-679-4660).

Upon completion of the course, the following must immediately be submitted to Human Resources, MC 4035 or fax # 860-679-4660):

- \_\_\_\_ College grade report showing a passing grade; and
- \_\_\_\_ College receipt separating out the tuition cost marked PAID

**Part VII. CERTIFICATION BY THE DEPARTMENT OF HUMAN RESOURCES**

\_\_\_\_ Tuition Reimbursement Calculation:

\_\_\_\_\_ x \_\_\_\_\_ = \_\_\_\_\_ x \_\_\_\_\_ = \_\_\_\_\_  
 Per Credit Cost      # of Credits      Total Cost      FTE      Reimbursement Amount

Note: For UConn courses, 100% of tuition will be reimbursed. For non-UConn courses, reimbursement will be 100% of the institution's tuition or UConn's tuition, whichever is less.

Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Human Resources Representative

**Submit completed tuition reimbursement request form to:** Department of Human Resources Benefits Unit, Mail Code 4035

**For Questions:** 860-679-2426