



APPLICATION FOR FEE REIMBURSEMENT

This application is to be completed at least one month prior to the beginning of the term by regular full-time employees requesting reimbursement for classes taken at S.D.S.U. or any recognized higher education institution. The completed and signed form must be sent to the Business Services Manager and will be approved by the Executive Director. Please note that the reimbursement will not occur until proof of successful completion of the course(s) is submitted to the Business Services Manager at the end of the term. Please attach a copy of the grade sheet/fee receipt upon completion of course(s). See the next page of this application form for criteria used to evaluate applications and to determine the reimbursement method. *Fee reimbursement may be processed through Payroll and subject to taxes.

Name: _____ Department: _____

Job Title: _____

Semester Applying For: _____ Start Date: _____

Completion Date: _____ (Approximate)

Check One: Course(s) will be taken on employee's own time.
 Course(s) will be taken during working schedule with Supervisor approval (signature required).

Course(s) Title(s): _____

Department: _____ Units: _____ Days/Time: _____

College or University: _____

Reason for Course(s); if job related, please explain how:

Is the Course(s) part of a program of study that can qualify you for a new trade or business? Please check one: Yes No

Approvals: _____ Comments: _____

Supervisor Date

Division Director Date

Executive Director Date

Denied (Indicate reason): _____

Employee Notified: _____ Date Reimbursement made: _____ Date

Criteria for Evaluation of Applications for Course Fee Reimbursement:

General Information:

- Awards given for one term at a time with no guarantee for subsequent terms. To receive consideration, employees must reapply each term.
- Length of time since last approved application for course fee reimbursement may be a factor in determining final awards, within overall available funding.
- Amount of award not to exceed cost of fees for 6 units or less in regular session at SDSU. This includes courses attended at other colleges/ universities.
- Reimbursement granted only upon submittal of written evidence of successful completion of course (official college/university report with a grade of "C" or better.)

1st Priority: Employed full-time*, minimum one year of continuous full-time employment with Associated Students at beginning of term in which application is made; recommendation of supervisor is required. For multiple requests within the same department, supervisor may consider additional criteria such as financial need, length of employment (seniority) and/or grade point average.

*partial-year or half-time employees will be considered, however amount of award will be calculated on basis of percentage of full-time employment, e.g., half-time position can receive maximum of 50% reimbursement, etc.

2nd Priority: Written evidence that courses directly relate to the employee's duties such as re-certifications, certifications, credentials, licenses, etc. and required or desirable to maintain current professional standing.

3rd Priority: Written evidence of foreseeable tangible benefit to the A.S. in the form of coursework directly related but not required for the employee's performance of their job duties and responsibilities.

4th Priority: Written evidence that pursuit of advanced degree(s) or proficiencies in employee's area of work responsibilities or internal career goals will benefit the organization, but are not required for performance of employee's current job duties and responsibilities.

Reimbursement Method Determination*

The method by which your fee reimbursement is paid is contingent upon the nature of the course(s) and regulated by the Internal Revenue Service.

Reimbursed through Accounts Payable (*Accountable Plan*): Courses taken must meet at least one of the following criteria:

- The education is required by your employer or the law to keep your present salary, status, or job. The required education must serve a bona fide business purpose of your employer.
- The education maintains or improves skills needed in your present work.

However, it is reimbursed through Payroll even if the course(s) meets one or both of the above and one of the following criteria:

Reimbursed through Payroll (*Non-Accountable Plan*): Courses taken must meet the following criteria:

- Is needed to meet the minimum educational requirements for your job; **or**
- Is part of a program of study that can qualify you for a new trade or business.