

Virginia Polytechnic Institute and State University
MEMORANDUM OF AGREEMENT FOR EDUCATIONAL AID REIMBURSEMENT
Complete this form in its entirety and submit to Human Resources.

Name (Print in ink or type)	Employee ID Number	Work Phone	Email Address
Check appropriate boxes: <input type="checkbox"/> Faculty <input type="checkbox"/> Staff		<input type="checkbox"/> Full-Time	<input type="checkbox"/> Part-Time
Tuition Reimbursement Requested for: (<i>Check One</i>) <input type="checkbox"/> FALL <input type="checkbox"/> SPRING <input type="checkbox"/> SUMMER ___ (I or II) <input type="checkbox"/> WINTER Year 20 _____			
Tuition Amount to be Reimbursed: <input type="checkbox"/> Full <input type="checkbox"/> Partial - \$ _____ (<i>must provide amount and justification</i>) <input type="checkbox"/> VT Differential Tuition - \$ _____			

Justification for Partial Tuition Reimbursement (*if applicable*)

Work Schedule	Department/District	On-Campus Mail Code	Mailing Address (if Off-Campus)
Credit Hours Requested	Class Schedule	Name & Location of Institution Where Course is Offered	
<i>(The maximum numbers of hours allowed in a semester/year applies to tuition waiver, tuition reimbursement or a combination of both.)</i>			

JUSTIFICATION

Title and general description of course: _____

Is this course part of an accredited degree program? Yes No. If YES, program of study: _____

Objective of course(s) and benefit to Virginia Tech: _____

AGREEMENT

I have read and understand all the requirements outlined on the reverse side of this agreement and *Policy 4800, Tuition Assistance and Reimbursement Program for Salaried Employees*. Therefore:

1. I agree to pay all non-tuition fees associated with taking the above identified course(s).
2. I agree to make up hours missed from work to attend the above identified course(s) (*Not applicable if department requires course*).
3. I agree, upon completion of the above identified course(s), to furnish my department and Human Resources with a copy of my tuition bill, the grade report which will show the title of the course(s) taken, the number of credit hours, and the grades received or a notation of progress achieved in the course.
4. I agree that I will be responsible for all tuition and fees incurred if the minimum grade requirement is not met, if I withdraw or resign from the above identified course(s) or if I separate from my current position at Virginia Tech.
5. I understand that employer provided tuition assistance (waiver and/or reimbursement) exceeding \$5,250 is taxable in most cases. The value of the benefit exceeding the allowable exclusion (per IRS) will be added as non-cash earnings for W-2 reporting and taxed accordingly.

Signature of Employee: _____ Date: _____

Department Head Approval:

I have read and understand all the requirements outlined on the reverse side of this agreement and *Policy 4800, Tuition Assistance and Reimbursement Program for Salaried Employees*. I agree to the following:

1. The tuition reimbursement is for a salaried employee and the above identified course(s) is (are) clearly related to the job the employee is currently performing for Virginia Tech.
2. Upon satisfactory completion of the above identified course(s), receipt of the appropriate documentation, and all requirements are met; I will reimburse the employee the amount agreed upon from department funds.
3. If applicable, my signature (department head) indicates approval to forgo the 90-day waiting period for this new employee.

Supervisor Signature	Typed or Printed Name of Supervisor	Date
Department Head Signature	Typed or Printed Name of Department Head	Date
Dean/VP Signature*	Typed or Printed Name of Dean/VP	Date

*Required only if more than five (5) credit hours are requested during normal work schedule.

HUMAN RESOURCES USE ONLY

Hire Date: _____ End Date: _____ Log Total Fees Reimbursed: _____

Credit hours verified by: _____

I certify that the faculty/staff member named in this request meets all the qualifications for tuition reimbursement.

Date: _____ Authorized Personnel Service Representative: _____

Tuition Reimbursement Guidelines

The following guidelines apply to full and part-time salaried faculty and staff employees of Virginia Tech who wish to take credit classes at institutions of higher education other than Virginia Tech and have satisfactorily completed their three (3) months waiting period (which may be waived by the department head) in order to establish eligibility for tuition reimbursement. This program is designed for state employees who are expected to continue in state service for a period which will justify this benefit.

Approval by the Department Head

In order to qualify for tuition reimbursement, the coursework or degree program must clearly be related to the job the employee is currently performing for the university. Tuition reimbursement may constitute a significant expenditure for the department and a considerable investment in an individual employee. In determining the propriety of approving tuition and fee support, approving authorities should consider the following:

- Likelihood of the employee continuing in service.
- Equitable application of policy to other employees in the department.
- Relevance of the educational program to current position.
- Availability of funds.
- Effective continuation of department programs.

Allowable Number of Hours Reimbursed

The maximum number of hours applies to the tuition waiver, tuition reimbursement or a combination of both. All credit awarded will count toward the maximum allowance whether or not the employee is actually required to be in attendance in the class session.

Departments may agree to pay the full or partial cost of the course(s), a justification should be provided if only partial reimbursement will be provided.

Tuition reimbursement for full-time salaried faculty or staff employees is limited to a total of twelve (12) credit hours per academic year (Fall through Summer II) with no more than six (6) credit hours waived in an enrollment period (Fall, Winter, Spring, Summer I, Summer II). A Vice President, Dean, or other senior manager may authorize assistance for up to 24 credit hours per year for Virginia Tech programs (e.g. PMBA, EMBA, XMNR) where the program is specifically designed for accelerated completion; if additional credit hours (beyond 12 per academic year) are approved, a P188 - Memorandum of Agreement and Promissory Note for Tuition Credits must also be completed by the employee and appropriate university officials. Part-time salaried employees are limited to a total of six (6) credits per year with no more than three (3) credit hours waived in a term.

If the tuition reimbursement and class schedule are approved by the department head, full-time employees may enroll in a maximum of five (5) credit hours per term during their normal work schedule. Additional hours may be taken outside of the normal work schedule. Exceptions to take courses with required laboratory sections requiring more than five credit hours during the normal work schedule must be approved by the department head and appropriate dean or vice president prior to the submission of the waiver request to Human Resources. Time missed from work must be made up. Time used to attend class during normal work hours must be made up on an hour-for-hour basis. No exceptions will be made to the number of hours that are approved for the reimbursement. Please see the policy (#4800) for further details of the program. Department administrative offices should be able to access the policy for employees on the Human Resources website www.hr.vt.edu.

How to Request Reimbursement

1. Prior to enrollment the employee must complete and submit to the department head, the most recent version of the *Memorandum of Agreement for Educational Aid Reimbursement* stating the benefit to the department and the job-relatedness. (Outdated forms will be returned to the employee with a request to complete the most recent version.) The department head signature is required on this form verifying job-relatedness and approval to pay for the course.
2. Once authorization has been obtained, the employee must forward the form to Human Resources for verification of requirements then it is returned to the employee to maintain until the completion of the course. Human Resources verifies accredited college or university, employee eligibility, allowable credit hours, employment status, class schedule versus employee's work schedule, departmental signature approval. Human Resources will also review reasons for job-relatedness.
3. Upon successful completion of the course, the academic grade report(s), a copy of the tuition bill, documentation of the reimbursement request (as processed through the university's payment system) to the appropriate departmental account, and the previously approved *Memorandum of Agreement for Educational Aid Reimbursement* must be submitted to the Human Resources. Once paperwork is reviewed and verified, Human Resources will forward it to the Controller's office to request reimbursement.

Responsibilities of the Employee/Student

1. If the employee has applied for financial aid, he or she is responsible for promptly reporting tuition waivers or reimbursements to the Scholarships and Financial Aid Office.
2. Payment for such courses shall be in the form of reimbursement to the employee for tuition and fees, contingent upon completion of the course with a grade of "C" or better or "pass" in a pass-fail system for an undergraduate course or a grade of "B" or better for a graduate course. Payment will be made from departmental funds. Payment will not cover audit courses.
3. The employee will assume full responsibility for all fees due in the event of withdrawal from the course. The employee will be responsible for the cost of the course on a pro-rated basis should there be a separation from employment during the semester