

ADMINISTRATIVE GUIDELINES

1. The City of Milwaukee Tuition Benefit Program does **not** cover employees of MPS, HACM, RACM, WCD or MEDC.
2. New employees (*with benefits*) may use the tuition benefit as of their **employment start date**; however, courses, seminars and conferences must begin **on or after** the start date. Memberships, certifications and licenses must be effective and paid for **on or after** the start date (*not all bargaining units are eligible; see Amounts Summary, Page 3*).
 - Current employees going from non-benefit to benefit are eligible for courses, seminars and conferences that began **on or after** the effective date you became eligible for benefits. Memberships, certifications and licenses must be effective **on or after** the date benefits begin (*not all bargaining units are eligible; see Amounts Summary on Page 3*).
3. Part-time (*regular*) employees working at least **20** hours per week are eligible to receive **prorated** Tuition Benefits.
4. To know in advance if a tuition reimbursement request will be approved, call or e-mail Judy Kammermann at 286-3650 (jkamme@milwaukee.gov) **or** Andrea Knickerbocker at 286-3387 (aknick@milwaukee.gov).
5. Tuition Reimbursement is added to the net total of your regular paycheck; no withholding tax is deducted.
6. **TUITION REIMBURSEMENT IS NOT COVERED FOR, but not limited to the following:**
 - Costs paid upfront by the employee's department.
 - Drivers and motorcycle licenses.
 - Software, personal computers/laptops/tablets, calculators, non-required textbooks, union dues, finance charges, sales tax, shipping/handling charges, late fees, administrative/processing fees, ID fees, student insurance fees, transcript fees, graduation fees, parking fees, travel expenses (*i.e. lodging, meals, mileage, transportation, parking*), magazine/journal/periodical subscriptions, DVDs (*videos*), equipment or supplies, Advanced Standing fees (*i.e. Work Experience, Transfer of Credit, Credit by Examination, etc.*).
7. **COLLEGE COURSES, NON-CREDIT COURSES, SEMINARS and CONFERENCES:**
 - a. Reimbursement is approved for courses, seminars and conferences that are related to your current position **or** to a reasonable transfer/promotional opportunity within City of Milwaukee government.
 - b. Reimbursement is based on the calendar year (January – December) and the reimbursement is applied to the year in which the course, seminar or conference **begins**.
 - c. Reimbursement will **cannot** be processed for payment prior to attending a course, seminar or conference.
 - d. The application **and** supporting documents should be submitted **as soon as possible**, but no later than **eight weeks** of the completion date. *Contact DER (#4 above) if you missed the deadline.*
 - e. Certain course subjects that are **not** approved include, **but are not limited to** *sports, fitness and recreation*.
 - Real Estate courses **must** be **directly related** to an employee's **current** position.
 - For **sworn personnel**, reimbursement requests for **dive** classes will cover the cost of the **class and required textbooks only**. *Supplies, equipment, certifications, licenses and exam fees are not covered.*
 - f. If you attend a course, seminar or conference while on an **unpaid** leave of absence or layoff you are **not** eligible to receive reimbursement.
 - If you begin a course **prior** to being seasonally laid off from your position or **prior** to taking an unpaid leave of absence, you will receive your reimbursement when you return to work. You must still complete the reimbursement application and submit the supporting documents within eight weeks of the course or seminar completion.
 - g. If pursuing a certificate program or college degree, the **major** must be related to your current position **or** relate to a reasonable transfer/promotional opportunity within City of Milwaukee government.
 - h. Tuition, seminar, or conference fee expenses paid **out-of-pocket** (*including student loans*) are eligible.
 - Tuition expenses paid for by a grant, scholarship, veteran's benefit, or paid upfront by the department are **not** reimbursable.
 - i. Textbooks for successfully completed courses are reimbursable only if they are **required** by the instructor.
 - j. Courses of more than three weeks in length and college courses require a **completion statement** (*i.e., certificate, letter of successful completion or grade report*).
 - For college courses a copy of the grade report **must** be submitted with the paid receipts.
 - A grade of "C-" or higher is required for college courses.
 - When grades are not given or a course of study taken is non-credit and more than three weeks in length, a certificate or statement of successful completion from the school or organization must be submitted along with the paid receipt(s).

- Conferences and seminars of less than three weeks in length do not require a completion statement.
8. **MEMBERSHIP DUES:**
- Organizations must be nonprofit, nonsectarian and established for the expressed purpose of providing information, resources and programming that benefit its members in their professional specialties.
 - Reimbursement is based on the calendar year (January – December). Membership Dues are applied to the year the enrollment period begins, not when the dues were paid.
 - The application and paid receipts should be submitted **as soon as possible**, but no later than **eight weeks** of payment. *Contact DER (#4 above) if you missed the deadline.*
 - Not all bargaining units are eligible for Membership Dues. *See Amounts Summary on page 3.*
9. **LICENSES:**
- Must be job or promotion related.
 - Reimbursement is based on the calendar year (January – December) and is applied to the year (*effective start date*) of the license.
 - **Represented sworn personnel** are **not** eligible for license reimbursement. *See Amounts Summary on Page 3.*
 - Out of state licenses are not approved for reimbursement.
 - **Real estate** related licenses and certifications must be **directly** job related.
 - The application, paid receipts and copy of the license should be submitted **as soon as possible**, but no later than **eight weeks** of payment for the license. *Contact DER (#4 above) if you missed the deadline.*
 - **Commercial drivers license (CDL):** Tuition reimbursement will be approved for a Commercial Driver's License Hazardous Material Endorsement, Tanker Endorsement, as well as Class A or B. Reimbursement includes the cost of the written test, license, fingerprinting and road test fees, *if applicable. Tests must be passed.*
10. **CERTIFICATIONS AND EXAMS:**
- Reimbursement is based on the calendar year (January – December) and is applied to the year the Certification was achieved. For exams and related study materials, reimbursement is applied to the year the exam was passed.
 - **Represented sworn personnel** are **not** eligible for Certification or Exam reimbursement; **however**, classes that **lead** to a certification are eligible as long as they are job-related or relate to a reasonable transfer/promotional opportunity within City of Milwaukee government. *See Amounts Summary on page 3.*
 - Applications, paid receipts, proof of certifications or passing exams, and related study materials should be submitted **as soon as possible**, but no later than **eight weeks** of receiving the certification or passing an examination. *All related supporting documents should be submitted together. Contact DER (#4 above) if you missed the deadline.*
 - If you obtain a certification or take an exam while on an **unpaid** leave of absence or layoff you are **not** eligible to receive reimbursement.
 - If you fail an exam and must pay to re-take it, you can only be reimbursed for the exam that was passed.
11. **A PAID RECEIPT MUST BE PROVIDED FOR ALL REIMBURSEMENT REQUESTS.**
- Acceptable** receipts include cash register, money orders, official receipts provided by the school or organization, proof of approved student loan, credit card statements, and canceled checks (*not check carbons*). **A receipt must show payment was made as well as the amount paid.**
 - Unacceptable** receipts include registration forms and invoices requesting payment **or** showing the balance is **due**, check registers and carbons, or receipts that show payment was made by another person. **Receipts must be on the school or organization's letterhead.** *Receipts written on a plain piece of paper are **not** acceptable.*
12. **Employees must remain in service for a 6-month period** after the successful completion date of approved courses, seminars or conferences for reasons of promotional opportunities or the amount reimbursed will be deducted from the employee's final paycheck. For Membership Dues, Licenses or Certifications and Exams, employees must remain in service for a 6-month period after reimbursement of such fees used for reasons of promotional opportunities, or the amount reimbursed will be deducted from the employee's final paycheck.
- Employees of Local 215, MPFFA, must remain in service for a **1-year period**.
 - **Exceptions are:** Retirements, positions eliminated due to budget cuts, tuition reimbursement used by the employee at the department's request, or reimbursement was directly job-related.
 - ***You will not receive reimbursement if you separate from City service prior to completing a course, seminar or conference for any reason.***

TUITION BENEFIT AMOUNTS SUMMARY

GENERAL CITY EMPLOYEES:

- A **maximum** of \$1200 per calendar year for tuition, required textbooks and job-related membership dues.
- Up to \$600 (*of the \$1,200 maximum*) per calendar year for job or promotion-related certification and license fees (*including related exam fees and study materials, provided the exam is successfully passed*).
- Part-time (*regular*) employees working at least **20** hours per week are eligible to receive **prorated** Tuition Benefits.

SWORN PERSONNEL:

*Represented sworn personnel are **not** eligible for membership dues, certification, examination or license fee reimbursement unless noted below.*

Chief Officers Association	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> A maximum of \$1200 per calendar year for tuition, <u>required</u> textbooks and job-related membership dues. <input checked="" type="checkbox"/> Up to \$600 (<i>of the \$1,200 maximum</i>) per calendar year for job or promotion-related certification and license fees (<i>including related exam fees and study materials, provided the exam is successfully passed</i>).
Local 215, Milwaukee Professional Firefighters' Association, IAFF, AFL-CIO (1/1/13 – 12/31/16)	<input checked="" type="checkbox"/> \$925 per calendar year for tuition and required textbooks
Milwaukee Police Association, Local #21, IUPA, AFL-CIO (1/1/13 – 12/31/17)	<input checked="" type="checkbox"/> \$1200 per calendar year for tuition and required textbooks
Milwaukee Police Supervisors' Organization (1-1-15 to 12-31-16)	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> \$1200 per calendar year for tuition and required textbooks <input checked="" type="checkbox"/> \$150 of tuition balance for membership dues

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HOW TO APPLY FOR TUITION REIMBURSEMENT IN SELF-SERVICE

*Do **not** apply for reimbursement if fees/tuition were paid **upfront** by your Department. The Tuition Benefit may only be used for **out-of-pocket** expenses paid by you directly.*

Before you begin you should have an active E-Mail account.

All correspondence regarding your Tuition Reimbursement Application is sent to your **City e-mail** address.

- If you **do not** have a City e-mail address or prefer to receive correspondence to a **personal** e-mail address, write your **personal** e-mail address at the **top** of the receipt. *Do this each time you apply for reimbursement.*

TO BEGIN THE APPLICATION:

1. Login to your Self-Service account: Milwaukee.gov/selfservice
 - Please note the URL (link) will change on 1/9/17 with the HRMS upgrade to v9.2: <https://hrprd.com.mycmsc.com/comhrprd/signon.html>
 - The splash page for HRMS/FMIS will not be changing. It will continue as: <https://prd.com.mycmsc.com/>
2. Click on **Main Menu**, and then **Self Service**, then **Learning and Development**, then **Tuition Reimburse Application** (save to "Favorites").
 - See example of a blank tuition reimbursement application on page 6.
3. You will see two tabs, **Find an Existing Value** and **Add a New Value**.
4. To apply for reimbursement, click on the **Add a New Value** tab.
5. Enter the **Course Start Date** (Example: 01/12/16). *Be sure to enter the correct **YEAR**.*
 - For Membership Dues enter the starting date of the membership enrollment period; **not the date paid**.
 - For Licenses or Certifications/Exams, enter the effective date of the license or date of exam; **not the date paid**.
6. Click the **Add** button.
7. At the top of the page you will see your Job Data and status that is current **as of** the starting date of the reimbursement request.

8. Under **Reimbursement Requests**, there are four tabs: **Details**, **Justification**, **Approvals** and **Status**. **Important Tips:**
- DO NOT click the plus sign  to the right of the screen. Clicking on the plus sign  adds a second row that allows you to enter information for a second class, dues or membership with the **exact same start date**.
 - Fit all information into the box. Do not add an extra row. If an extra row is added it will create an error message when you click the **Save** button and you will have to start over again!
9. In the **Details** tab, choose the **Reimbursement Type** by clicking the  symbol then click on the appropriate **Reimbursement Type**. (See bottom of page 4 for an explanation of **Reimbursement Types**.)
10. Enter the **Ending Date** of the course, seminar, conference, dues, license or certification. If it's a one-day class, type the same date. **Note:** Please see the *Amounts Summary on page 3* to see if you are eligible for dues, license and certification/exam fee reimbursement. If you are not sure you are eligible, contact Employee Relations (see page 1, #4).
11. Enter the **TITLE** of the course, seminar, conference, dues, license or certification. For membership dues, list the **full** name of the organization, not the acronym.
12. For a **college** course, add the number of credits (*optional*). Please enter a whole number (3, 5, 10) and do not type 3.0, 4.0, 10.0, etc or you will get an error message when you save the application.
13. In **Costs to Reimburse** enter the cost of the individual course, seminar, conference, dues, license or certification. Do not type a dollar sign (\$). If you received veteran's benefits, grant or scholarship list **only** the cost for each course that you personally paid out-of-pocket or received a student loan.
14. Enter the total cost of textbooks. You may only request reimbursement for textbooks that are **required**. Do not include sales tax or shipping/handling fees as they are not reimbursable. (See page 1, #6 for details on what is **not** covered.)
15. Click check the boxes that apply: *on city time, related to current job, related to a promotional opportunity*.
16. Click the **Justification** tab and in the box, provide an explanation of **how** the course, certification, license or exam **relates** to your current position **or** to a reasonable transfer/promotional opportunity within City of Milwaukee government. Fit the explanation inside the box. If the course is for a college degree, also state your "major."
17. Go back to the **Details** tab.
- If you have no further reimbursement requests, go to #18.
 - If you have additional reimbursement request(s) with the **SAME Start Date**, click on the  symbol at the right of the row and repeat steps 9 – 17. Go to #18 when finished. *If you took two or more college classes that began within a week of each other in the same semester, you may use the same start date for each. Just follow the instructions above.*
 - If you have another reimbursement request with a **DIFFERENT Start Date**, follow #18 below, then go back to #2 and start a new application. Repeat this with each different **Start Date** request.
18. There are 2 parts to saving the application. 1) Click the **Save** button. A "tuition reimbursement completion page" will appear. 2) Read it and click the **OK** button to **complete and save** the application. If you do not want to save the application, select **Cancel** and not the **OK** button.
19. When you are completely finished, please log off of self-service by selecting the **Sign Out** button at the top right corner.
20. Continue to Page 5 and read "**Where and How to Submit Your Supporting Documents.**"

EXPLANATION OF REIMBURSEMENT "TYPES"

COLLEGE:	<i>College courses</i>
SMNR:	<i>Seminars, conferences and non-credit courses</i>
DUES:	<i>Job-related, professional organizations</i>
LICENSES:	<i>Job or promotional related licenses (do not use this type for courses related to a license; use SMNR)</i>
CERTIF:	<i>Job or promotional related Certifications or Examinations (do not use this type for courses related to a certification or exam; use SMNR)</i>
COURSE:	<i>Do not select this type; for Employee Relations' use only</i>
PDA:	<i>Do not select this type; for Employee Relations' use only</i>

WHERE and HOW TO SUBMIT YOUR SUPPORTING DOCUMENTS

Submit Receipts (<i>page 2, #11</i>) and Completion Statements (<i>page 1, #7-j</i>) using one of the methods listed below. PLEASE DO NOT HIGHLIGHT OR CIRCLE TEXT ON THE DOCUMENTS.	
E-MAIL: jkamme@milwaukee.gov (preferred method)	Attachments must be in a viewable format such as a PDF. <input checked="" type="checkbox"/> If you received a receipt or completion statement via e-mail you may forward it. <input checked="" type="checkbox"/> You may paste <i>screen shots</i> of your documents into an e-mail message provided the image is legible and prints on 8 ½ x 11 paper. <input checked="" type="checkbox"/> Please type " <i>tuition reimbursement docs</i> " in the subject line; do not leave it blank. <input checked="" type="checkbox"/> Do not provide a link to a document or website.
FAX: (414) 286-0203	Use a cover page and address it to Judy Kammermann <i>or</i> Training & Development Services
INTEROFFICE MAIL:	<u>ATTN:</u> Judy Kammermann, City Hall – DER, Room 706
U.S. MAIL:	Dept. of Employee Relations, <u>ATTN:</u> Judy Kammermann 200 E. Wells St – Room 706 , Milwaukee WI 53202-3515
IN PERSON:	City Hall – Room 706, <u>ATTN:</u> Judy Kammermann (8:00 am – 4:30 pm weekdays)

I COMPLETED THE REIMBURSEMENT APPLICATION AND SUBMITTED THE SUPPORTING DOCUMENTS. WHAT HAPPENS NEXT?

- Your application is reviewed in the order the supporting documents are received (usually within **8 business days**). *Please be patient as the documents and applications are not reviewed on a daily basis.*
 - If you are concerned that your documents were received by *Training & Development Services*, submit them via **e-mail** rather than interoffice mail, U.S. mail or fax. Due to the volume of applications and documents received on a daily basis, it is not practical to search for documents received via interoffice mail, U.S. mail, or fax.
- After your application **and** supporting documents have been reviewed, Judy Kammermann will send you a "determination" via **e-mail**. *Assuming the application is approved, the e-mail will include: 1) amount approved, 2) paycheck date of the reimbursement, 3) your remaining balance, 4) comments.*
 - If the application is denied, was not completed, supporting documents are missing or unacceptable, or if further information is needed, you will be contacted via **e-mail**.
- In general**, approved reimbursement requests are processed within **3 pay periods** from the date your supporting documents were received, assuming the application was completed and the supporting documents were acceptable. *Again*, the "determination" e-mail will include the paycheck date.
 - For conferences and seminars, the reimbursement cannot be processed prior to your attendance.
- To check your available balance** at any time, login to Self Service then go to: *Main Menu > Self Service > Learning and Development > Tuition Reimburse Application*. Click the **Search** button. Click on any record with a start date of the year you want to check the balance for. Towards the top right side, you will see **Annual Reimb. Amount**. Directly beneath will be the **Balance Available**. If it is blank, you have no remaining balance. *Again*, your balance is shown in the determination e-mail.

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- The most recent version of this document can be found at: www.milwaukee.gov/der/TuitionBenefit
 - The most recent version of general Self Service Instructions can be found at: www.milwaukee.gov/der/SelfService



Department of Employee Relations
 Training & Development Services Section
 200 E. Wells Street, Room 706
www.milwaukee.gov/der



TUITION REIMBURSEMENT APPLICATION

Below is what you will see after you "Add a New Value" (page 3, #6)

JUDY KAMMERMANN Empl ID 002198 Year 2016

*Submission Date: 10/14/2016 *Start Date: 03/31/2016

Department: 1652 DER - OPERATIONS DIVISION

Job Code: 0489DC PROGRAM ASSISTANT II

Union Code: 6A Local 428, AFSCME-Reg.5

Employment Status: Active

Full/Part Time: Full-Time

Service Date: XXXXX

Max Dollars: 1200.00

Balance Available: 1200.00

The Job Data displayed is based on the "start date" entered for the application.

[Click here for Current Tuition Reimbursement Guidelines](#)

In the justification tab below explain how the course is related to your current position or to a reasonable promotional opportunity within city government. If the course(s) are electives related to a degree you are seeking, state your Major, and explain how the degree relates to your current position or to a promotional opportunity. DO NOT exceed 250 characters to explain the justification and DO NOT add rows to the justification by pressing the [+] button.

Reimbursement Requests

*Reimb. Type	Start Date	*End Date	*Course Title/Membership	Credits	Course over 3 weeks long?	Costs to Reimburse	Books or Supplies Cost	On City Time?	Related to current job?	Related to a promotional opportunity?	Dept. Mandated Course?
	03/31/2016										

Comments from DER Review

Tuition Reimb. Trans ID	Approved payment/adj sequence	Tuition Reimb. Type	Payment Amount	Date Sent to Payroll File	Date of Pay	Entry Type
1						

Buttons: Save, Notify, Refresh, Add, Update/Display, Include History, Correct History

Click on the magnifying glass then select the appropriate reimbursement "type." (see bottom of page 4 for explanation of reimbursement types)

Fill in the appropriate boxes then go to the "Justification" tab next to "Details" on the far left.

When you have completed the Details and Justification tabs, click the **SAVE** button. A completion page will come up. Review it, and then click the **OK** button. The application is now saved. If you click the **CANCEL** button, the application will not be saved.

Please note that when you click the **OK** button, you are acknowledging that you have read the Tuition Reimbursement Instructions and Administrative Guidelines and agree to abide by them.

Click the **plus sign** to add **another row only** if you have another course with the exact same start date. See page 4, #17, 2nd bullet.