

UNIVERSITY OF WISCONSIN – MADISON
Reimbursement Request for Career-Related Coursework or Training

This form is not to be used for training that is required by the employer, or by law or regulations to maintain salary, status, or current position (if the requirements serve a business purpose of the University), or taken to maintain or improve skills required in the employee's present work.

TO BE COMPLETED BY EMPLOYEE:

Employee Name:

Employee Job/Appointment Title: Appointment Percent: 100% Other

Employing Unit: Division, College or School: Department Name:

Address:

Proposed Course Title(s) and Number(s):

Name of Institution of Higher Education to be attended:

Have you been admitted? Yes No

Undergraduate Graduate Other (specify):

Semester Offered: Fall Spring Summer Year Offered:

Number of Credits: Total Fees and Tuition to be Requested: \$

List amount(s) of any grants and/or scholarships received to help pay for tuition and fees of this coursework:

What day(s) of the week and time is/are course(s) or training offered?:

Course occurs during work hours: Yes No

If yes, how will employee make up worktime?

Describe the relationship between the actual course(s) or training listed above and your present position. How will the course(s) or training qualify you for development within your current position or for advancement within the profession in which you are currently working? Stating that a course is required, as part of a degree, is not sufficient justification. Please list how each course or training is career-related.

Employee Signature: _____ Date: _____

Once the Employee completes the first section, please submit to supervisor or department manager to complete the next section; if approved at the department level.

(over)

TO BE COMPLETED BY DEPARTMENT MANAGER or APPROVING AUTHORITY:

Please Print Your Name:

Please Print Your Title:

Will this course qualify the employee for development within their current position or for advancement within the profession in which the employee is currently working? Yes No

If no, stop and return this form to the employee. Tuition reimbursement is not approved.

If yes, the following information is needed:

Fund/Account to be charged:

*Amount Department Commits for Reimbursement:

Submit this form to the Assistant Dean for Human Resources for the School of Education for review, completion and approval. Signatures below as required.

Supervisor: _____ Date: _____

Department Chair: _____ Date: _____

Dean or Director: _____ Date: _____

In accordance with HR Policy Chapter 12.01, this request for career-related tuition reimbursement has been

Approved Denied for the following reason(s): _____

Human Resources: _____ Date: _____

Updated January 2016

Tuition is reimbursed through the e-Reimbursement system. This prior approved form, proof of successful completion of course work (typically a grade report or a letter from the registrar) and a receipt for tuition payment must be included when the expense report is submitted to the department's e-Reimbursement approver.

Tax Information

Tuition reimbursements totaling \$5,250 or more in one calendar year will be subject to Federal and State tax withholding and reporting regulations. FICA (Social Security and Medicare), Federal, and State tax will be withheld from the employee's paycheck for taxable educational assistance expense reimbursements totaling \$5,250 or more that the employee receives during the calendar year (See IRS Publication 970, Employer-Provided Educational Assistance).

The taxable amount will be included in the employee's wages and reflected on the employee's W-2 Form, in addition to being subject to FICA, Federal, and State tax withholding. Any non-taxable reimbursements will not be included in wages. If employees have questions concerning tax treatment they should be encouraged to visit the IRS publications mentioned above. For any further questions, please encourage the employee to contact a tax professional.