

UTMB – HUMAN RESOURCES/Organizational Development Training & Recognition
UTMB Request for Tuition Reimbursement Checklist

Reimbursable Expenses	Non-Reimbursable Expenses
<ul style="list-style-type: none"> Tuition – Courses eligible for reimbursement (capped at a maximum of \$1,350 per student per fiscal year) must be for college credit(s) from a regionally accredited college or university. This includes classroom and online courses. Related Fees (e.g. building use fee, technology fee, student services, health & insurance fees for students in health-related studies, registration fees, etc. 	<ul style="list-style-type: none"> Parking Costs Late Fees or Financing Fees Books Incidental Items – including those required by the instructor (e.g. calculators, book bags, etc.) Travel Expenses

Important: Please initial that you have met and understand the requirements on each item listed below. Pre-approval is required from Human Resources prior to the beginning of the class(es) start date. Complete information **MUST** be provided on this application along with your degree plan, otherwise; it will result in the delay or denial of your request.

Employee ID #	First Name	Middle Initial	Last Name
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STEP 1 – HUMAN RESOURCES – Organizational Development, Training & Recognition – (409) 747-6700
Pre-Approval Required Before Class(es) Start

- _____ 1. Employee has worked consistently for 30 hours or more per week, and has completed six months of employment, and employee is in good standing as defined as overall meets standards at last evaluation and has no disciplinary action above a written warning prior to the beginning of class(es).
- _____ 2. The **UTMB Request for Tuition Reimbursement Application** form must be completely filled in and have appropriate signature approvals from the employee and supervisor.
- _____ 3. The **UTMB Tuition Reimbursement Agreement** form must be completed and have employee signature only.
- _____ 4. If applying for a Degree Program, please include the Degree Plan. By providing a degree plan it is only necessary to apply once. If changes or cancellations occur to the degree plan you are responsible for providing updated information in order to receive reimbursement.
- _____ 5. Final approval for tuition reimbursement is authorized by the UTMB HR Department Designee. Mail the completed and signed forms directly to Human Resources – Organizational Development, Training & Recognition to campus mail: Route 0909 or U.S. Mail: 301 University Blvd., Galveston, TX 77555-0909.
- _____ 6. A notice regarding the status of your request will be sent to you via email or a letter will be sent for employees without email. Employees should retain copies of the forms submitted.

STEP 2 – FINANCE – Transitional Accounting – (409) 747-8078
Reimbursements Are Processed Within 30 Days Upon Successful Completion Of Each Semester/Class Period

- _____ 1. Reimbursement may be obtained upon successful completion of the course(s) and is subject to Policy 3.5.2. Guidelines.
- _____ 2. If you have met all eligibility requirements for tuition reimbursement, reimbursement will be included in your paycheck. Employees should understand that they are subject to comply with all applicable federal, and state regulations. This includes review of taxation issues of Federal and FICA Taxes addressed by the Internal Revenue Code.
- _____ 3. To request reimbursement the following items must be submitted:
 - Legible copies of passing grades, **AND**
 - Legible itemized receipt of paid fees mailed directly to Finance-Transitional Accounting, campus mail: Route 0921 or U.S. Mail: 301 University Blvd., Galveston, TX 77555-0921.
- _____ 4. Finance - Transitional Accounting can be contacted directly for the status of the reimbursement.

UTMB – HUMAN RESOURCES/Organizational Development Training & Recognition
UTMB Request for Tuition Reimbursement Application

Employee ID #		First Name		Middle Initial	Last Name	
Department Name (spell completely)				Employment Start Date		Mail Route
Other Mailing Address (if no mail route is available, e.g. Street Address, PO Box, Rural Route, etc.)				City and State		Zip Code
Home Phone	Work Phone	Cell Phone	Based on the policy, the tuition being reimbursed is: _____ Job Related _____ Not Job-Related			
Are you asking for tuition reimbursement in pursuit of a degree? _____ Yes _____ No If yes, please attach your degree plan with course names, course id, section numbers, credit hours, and estimated course start dates.						
Tuition Reimbursement is for: _____ Graduate _____ Undergraduate		Type of Degree Sought (M.D., Ph.D., M.S., B.S., A.A.S., etc.)		Major/Plan/Other (please spell completely ex: Nursing, Pharmacy, etc..)		
Do you or will you receive reimbursement from any other source? _____ Yes _____ No If yes, please state source(s) and attach documentation from the source(s). Please note that reimbursement through this policy can be sought only after these funds have been exhausted.						
If no degree plan is attached, please complete bottom portion.						
I am applying for reimbursement for the following: Individual Class(es) Name (spell completely)			Course ID (ex: ENGL, MGMT, PSYC)	Section No (ex: 2100, 2110, 2317)	Credit Hours	Class(es) Start Date
1.						Class(es) End Date
2.						
Name of all Colleges/Universities Attending (spell completely):						State:

Employee Signature:	Email:	Date:
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I understand Policy 3.5.2. Tuition Reimbursement for College Credit Coursework requirements (page 1 of 3) and the UTMB Tuition Reimbursement Agreement form (page 3 of 3) and hereby confirm that according to the policy employee eligibility requirements have been met for accepting tuition reimbursement.

Supervisor Signature:	Email:	Date:
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I understand the Policy 3.5.2. Tuition Reimbursement for College Credit Coursework and the UTMB Tuition Reimbursement Agreement form and hereby confirm that Education initiated by an employee and covered by this policy should be pursued outside normal working hours. In instances, where classes are only available during normal working hours, supervisors are encouraged to provide flexible work schedules and appropriate use of paid leave (e.g. vacation, compensatory time, etc.) However, any such work scheduling to accommodate class time is subject to supervisor approval and shall be reviewed every semester or course period. I further understand that the Institutional Tuition Reimbursement for College Credit Coursework is an institutional benefit and, therefore; reimbursement is from an institutional account.

CMC – HR Department Designee Signature (for correctional managed care employees only):	Date:
UTMB – HR Department Designee Signature:	Date:

UTMB – HUMAN RESOURCES/Organizational Development Training & Recognition
UTMB Tuition Reimbursement Agreement

This agreement is made by and, between The University of Texas Medical Branch hereinafter referred to as UTMB, and a UTMB EMPLOYEE hereinafter referred to as EMPLOYEE.

- A. Now, therefore, and in consideration of the mutual benefits and covenants, the parties agree as follows:
1. That UTMB hereby agrees to pay a sum equal to the amount paid for tuition (capped at a maximum of \$1,350 per student per fiscal year) from a regionally accredited college or university. This includes classroom and on-line courses.
 2. That EMPLOYEE understands that upon completion of any semester, EMPLOYEE will work for UTMB one semester for every semester paid for by UTMB.
 3. **EMPLOYEE UNDERSTANDS THAT THIS AGREEMENT DOES NOT CONSTITUTE A CONTRACT FOR EMPLOYMENT AND NO TERM OR CONDITION IN THIS AGREEMENT SHOULD BE CONSTRUED AS A GUARANTEE OF EMPLOYMENT.** EMPLOYEE further understands that this Agreement is not a guarantee of employment in a particular position, classification or salary rate. EMPLOYEE understands that continued employment at UTMB is contingent on EMPLOYEE maintaining the standards of performance for his or her position of employment at UTMB. EMPLOYEE further understands that EMPLOYEE is subject to the Rules and Regulations of the Board of Regents and to UTMB's Human Resources policies and procedures during EMPLOYEE'S utilization of TUITION REIMBURSEMENT and during the PAY BACK PERIOD.
 4. That if EMPLOYEE chooses to resign from UTMB but continues enrollment in school, payback procedures will be initiated thirty (30) calendar days after the semester.
 5. That if EMPLOYEE fails to stay in the employment of UTMB for the period of time for which the EMPLOYEE was enrolled after the reimbursement is received, the payback procedures described in Section B of this Agreement will be initiated immediately. However, if the EMPLOYEE does not stay in the employment of UTMB due to a Reduction In Force, UTMB will reimburse the employee within 30 calendar days after the completion of the semester. It will be the employee's responsibility to confirm that UTMB has a Current Address.
 6. UTMB will provide EMPLOYEE with a statement setting forth the total amount to be repaid and a schedule of payments. EMPLOYEE shall have the option of making a lump sum payment or installation payments.
- B. It is further agreed that:
1. In the event of DEFAULT in payment on any installment due, the entire unpaid indebtedness shall, at the option of UTMB, become due and payable. Notice of acceleration of this Agreement is hereby waived.
 2. In the event of default, EMPLOYEE'S obligation shall become enforceable in Galveston, Texas and suit to enforce the terms of this obligation shall be brought in Galveston County, Texas. No delay on the part of UTMB in exercising any power or right under this Agreement shall operate as a waiver of the power or right, nor shall any single or partial exercise of any power or right preclude further exercise of that power or right.
 3. No provision of this Agreement shall be modified except by written instrument signed by the parties expressly referring to this Agreement and to the provision modified.
 4. This Agreement shall be effective from the date of receipt until EMPLOYEE'S completion of the Payback Period as defined in Paragraph A.4 of this Agreement.

Employee ID #	Printed Name	Employee Signature	Date
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