

## CITY OF SAN ANTONIO



<b>Administrative Directive</b>	AD 4.77 Tuition Assistance and Student Loan Employer Contribution Plans
<b>Procedural Guidelines</b>	Guidelines and Procedures for the City of San Antonio Tuition Assistance and Student Loan Employer Contribution Plans
<b>Department/Division</b>	Human Resources
<b>Revision Date(s)</b>	September 8, 1980; August 29, 1994; October 1, 2015; October 1, 2016; October 1, 2017; April 1, 2019
<b>Last Reviewed</b>	January 19, 2021
<b>Owner</b>	HR, Employee Benefits Administrator

### Purpose

The purpose of this administrative directive (AD) is to establish guidelines and procedures for the Tuition Assistance Program administered by the City of San Antonio (City) and the Student Loan Employer Contribution Plan

### Policy

Through the Tuition Reimbursement Plan, the City provides financial assistance to eligible employees who are seeking education for professional development from an *accredited institution* that may advance their career within the City. Through the Student Loan Employer Contribution Plan, the City provides a monthly contribution toward existing student loan debt. Beyond the scope of this AD, the City is not required to promote, transfer or otherwise reward employees after completing courses or graduation.

### Policy Applies To

- |   |  |
|---|--|
| <input type="checkbox"/> External & Internal Applicants         | <input type="checkbox"/> Temporary Employees                         |
| <input checked="" type="checkbox"/> Full-Time, Active Employees | <input type="checkbox"/> Volunteers                                  |
| <input type="checkbox"/> Part-Time Employees                    | <input checked="" type="checkbox"/> Grant-Funded Employees           |
| <input type="checkbox"/> Paid and Unpaid Interns                | <input checked="" type="checkbox"/> Police and Fire Academy Trainees |

Uniformed Employees Under Collective Bargaining Agreements (Refer to the respective organization's Collective Bargaining Agreement)

### Definitions

<b><u>Accredited Institution</u></b>	For purposes of this AD, an institution of higher education must be accredited by a state education department, or by either the Southern Association of Colleges and Schools or a similar regional association recognized by the United States Department of Education.
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<p><b><u>Degree Plan</u></b></p>	<p>An approved outline provided by the attending university or college of all required courses and electives for a degree program.</p> <p>Degree Plans also include Career and Technical School Certificate programs. These programs consist of education courses from a trade or technical school that result in a certificate <i>relevant to a city job</i>. Some examples (which are offered locally through the Alamo Community College District) include Aviation Management; Computer Support Specialist; Horticulture Science; Administrative Assistant; Warehouse Management; Automotive Technology, Electrical Trades etc. These programs typically last for 20 – 60 college hours.</p>
<p><b><u>Student Loan Employer Contribution Plan</u></b></p>	<p>Any US based loan servicer or organization that manages the collection of student loan payments are eligible for participation in the plan for any course of study.</p>
<p><b><u>High School Equivalency Exam (GED)</u></b></p>	<p>Any assessment approved by the Texas Education Agency which can be used to issue the Texas Certificate of High School Equivalency. Tests may only be administered by authorized testing centers.</p>
<p><b><u>Supporting Documentation</u></b></p>	<p>The documents submitted by the employee requesting tuition reimbursements. Documents include:</p> <ol style="list-style-type: none"> <li>1. Tuition Assistance Program Application signed by employee’s supervisor and department Director</li> <li>2. Proof of approved <i>degree plan</i>, Final grade earned or proof of course completion of Pass/Fail courses and the number of credit hours earned, if applicable</li> <li>3. Copy of invoice/bill from the school or institution</li> <li>4. Course(s) title(s)</li> <li>5. Dates of course duration</li> </ol> <p>In order to receive the employer contribution towards their student loans, employees must enroll via the portal with the Third Party Administrator. Employees need the following information to complete the enrollment process:</p> <ol style="list-style-type: none"> <li>1. Loan Servicer Account Username &amp; Password</li> <li>2. Loan Account Number(s)</li> <li>3. Servicer Payment Address(es)</li> </ol>

## Policy Guidelines

Tuition reimbursement shall be for undergraduate and graduate *degree plan* courses, up to and including doctoral (post-graduate) courses, taken from an *accredited institution* in a classroom or online for which a letter grade or Pass/Fail notice is awarded.

Courses should relate to the development of the employee's career opportunities within the City and explained on the Tuition Assistance Program Application. Tuition assistance applications must be accompanied by a letter from the employee's college advisor or a copy of the current *degree plan* verifying that the course taken is part of an established *degree plan*. Any elective courses not in the *degree plan* submitted for reimbursement must have written approval by the graduate or undergraduate advisor.

1. Tuition reimbursement amounts for non-Pass/Fail courses will be based on the letter grade earned by the participating employee for the course under the qualified *degree plan*. Reimbursed amounts are tied to the UTSA Undergraduate tuition rate for a 4-year institution or the in-district Alamo Community College District (ACCD) rate for a 2-year institution, as defined below.

<b>LETTER GRADE EARNED</b>	<b>PERCENTAGE of TUITION REIMBURSED</b>
A	100%
B	90%
C	75%
D	0%
F	0%

### Tuition Reimbursement

2. The "Pass/Fail" course reimbursement amount is 100% of tuition for courses receiving a "Pass."
3. Courses started prior to employment shall not be considered for reimbursement.
4. An employee may no longer participate in City's Tuition Assistance Program after employment with the City ends. Therefore, reimbursement payment processing will stop in the event a Tuition Assistance Program application was submitted prior to end of employment.
5. Total Tuition Assistance Program expenditures by the City may be limited to the budgeted amount approved each year for the program through the City's adopted budget. Reimbursement applications received after the budgeted amount has been reached may be delayed or rejected.
6. Courses taken from non-accredited institutions are not eligible for tuition reimbursement.
7. Employees have the right to select the educational institution of their choice. However, reimbursement amounts shall not exceed the traditional in-person Undergraduate tuition rates of the University of Texas at San Antonio (UTSA) for courses completed at a 4-year institution or of the traditional in-person in-district ACCD tuition rate for courses completed at a 2-year junior college, trade school or technical school.

<p><b><u>Tuition Reimbursement cont.</u></b></p>	<ol style="list-style-type: none"> <li>8. Employees receiving any assistance for costs associated with courses or examinations under the City’s Certification Pay Program may not apply for additional reimbursements through the Tuition Assistance Program for the same courses or examinations.</li> <li>9. Participating employees can receive tuition reimbursement for a maximum of 6 credit hours per enrollment period (semester or duration of a course), up to a maximum of 18 credit hours per fiscal year. Only tuition is reimbursable by the City. Costs for expenses such as books and fees will not be reimbursed.</li> <li>10. Total annual tuition reimbursement is subject to tax in accordance with Internal Revenue Service guidelines. Taxes will be taken out of the amount reimbursed in the employee’s payroll check.</li> <li>11. Nothing in this AD shall prohibit an individual department’s ability to reimburse employees for job-related conferences/seminars, as the department’s budget allows.</li> <li>12. Employees receiving tuition assistance from any other sources, including but not limited to scholarships and the U.S. Department of Veterans Administration, shall only receive reimbursements from the City for the employee’s net expense after all other tuition assistance has been applied. The reimbursement amounts shall continue to apply, but total reimbursements from all sources must not exceed the total cost of the course.</li> </ol>
<p><b><u>High School Equivalency Exam (GED) Reimbursement</u></b></p>	<p>Employees attempting to complete an eligible High School Equivalency Exam are eligible to have testing fees reimbursed. Employees must meet all requirements as set forth by the Texas Education Agency.</p> <ol style="list-style-type: none"> <li>1. Employees are encouraged, but not required to attend an approved preparation course.</li> <li>2. Reimbursements will be based on amounts approved by the Texas Education Agency, and may be limited by the total Tuition Assistance Program budget set each year as part of the City’s adopted budget.</li> <li>3. In the event the employee fails to pass the test, each individual test is reimbursable a maximum of three times per year.</li> </ol>
<p><b><u>Employer Contribution toward Student Loan</u></b></p>	<ol style="list-style-type: none"> <li>1. Employees are eligible to participate in the <i>Student Loan Employer Contribution Plan</i> as of date of hire.</li> <li>2. Employer contributions to loan servicer will be made the month following registration has been completed.</li> <li>3. Employee must be actively at work the month in which payment is made.</li> <li>4. Employer contributions are subject to Federal income tax and TMRS deduction.</li> <li>5. Employees are required to continue their loan repayment schedule making student loan payments in accordance with established plan(s). The City’s contribution is in addition to established payment arrangements with the loan servicer.</li> <li>6. City loan contributions are made on behalf of employee only. Loans for a spouse or child loans (i.e., parent plus) are not eligible for City contribution.</li> </ol>

## Roles & Responsibilities

<p><b><u>Human Resources Department</u></b></p>	<ol style="list-style-type: none"> <li>1. The Human Resources Department will administer the City’s Tuition Program. The <i>Student Loan Employer Contribution Plan</i> is administered by an external vendor.</li> <li>2. The Human Resources Director possesses final approval authority over all Tuition Assistance Program Applications.</li> <li>3. The Human Resources Department will maintain all <i>supporting documentation</i> for Tuition Reimbursement program in a central database or files.</li> <li>4. Human Resources will provide an electronic eligibility file to the third party administrator on a bi-weekly basis.</li> </ol>
<p><b><u>Employees – Tuition Reimbursement Program</u></b></p>	<ol style="list-style-type: none"> <li>1. Employees must ensure the <i>supporting documentation</i> is submitted to their supervisors within 45 calendar days from the date grades are posted by the schools. Applications submitted after the 45<sup>th</sup> calendar day will not be considered for eligibility under this policy.</li> <li>2. Employees must sign an Acknowledgment Form for this AD (Attachment A) upon initial request to use the Tuition Reimbursement Plan.</li> <li>3. Employees must attend courses on their own time. Employees who must take courses during their working hours must obtain written authorization to adjust work schedule from the department Director and forward the written approval to the Human Resources Department, Benefits Division.</li> <li>4. Employees may appeal to the Human Resources Department in cases when an application for reimbursement is not approved by the department.</li> </ol>
<p><b><u>Employees – Student Loan Employer Contribution Plan</u></b></p>	<p>Employees must enroll via the portal managed by the Third Party Administrator in order to start the process to receive the employee contribution towards their student loan. Employees need the following information to complete the enrollment process:</p> <ol style="list-style-type: none"> <li>1. Loan Servicer Account Username &amp; Password</li> <li>2. Loan Account Number(s)</li> <li>3. Servicer Payment Address(es)</li> </ol>
<p><b><u>Departments – Tuition Reimbursement Plan</u></b></p>	<ol style="list-style-type: none"> <li>1. Supervisors will complete the “Supervisor Recommendation” section of the Tuition Reimbursement Plan Application and forward the application to the Department Director.</li> <li>2. Department Directors will make the final recommendation on the Tuition Reimbursement Program Application and forward all <i>supporting documentation</i> to the Human Resources Department within 45 calendar days from the date grades are posted by the schools to ensure applications are considered.</li> <li>3. Department Directors will ensure supervisors are reviewing, signing, and forwarding Tuition Reimbursement Plan Applications to their office in a timely manner.</li> <li>4. As their budget allows, departments may provide funding assistance for additional programs or activities, such as certifications, classes, seminars, conferences, lectures, etc.</li> </ol>

This AD supersedes all previous correspondence on this subject. Information and/or clarification may be obtained by contacting the Human Resources Department.



## **CITY OF SAN ANTONIO**

### **EMPLOYEE ACKNOWLEDGMENT FORM FOR**

#### **ADMINISTRATIVE DIRECTIVE 4.77 Tuition Assistance and Student Loan Employer Contribution Plans**

**Employee:**

I acknowledge that on \_\_\_\_\_, 20\_\_\_\_, I received a copy of Administrative Directive 4.77, Tuition Assistance and Student Loan Employer Contribution Plans, and was given the opportunity to ask questions or contact my Human Resources Representative.

\_\_\_\_\_  
Employee Name (Print)

\_\_\_\_\_  
Department

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Employee SAP ID Number

Attachment A  
Personnel File (original)