


<b>EMPLOYEE</b>
<b>Tuition Reimbursement Program</b>
<b>Handbook</b>

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# For Employees...

## Education made affordable!

At the Ernest Orlando Lawrence Berkeley National Laboratory (LBNL), we are committed to developing our people to their fullest potential.

Through the Tuition Reimbursement Program, the Berkeley Lab encourages and financially assists career employees in obtaining skills, knowledge, and abilities that increase the effectiveness of work performance in their present position and improve their career opportunities within the Laboratory.

With supervisor approval, career employees who have passed probation and are working 50% time or more are eligible to receive reimbursement for tuition expense for position-related or career-related college courses that are relevant to the goals of the Laboratory. For employees pursuing **degrees or specialty certificates (Tier 1)** reimbursement is 100%. For employees taking career-related college **courses not leading to a degree (Tier 2)** reimbursement is two-thirds. Participation in the program is an important privilege that can lead to greater job satisfaction, enhanced performance, and expanded career possibilities.

**Tier 1:** The employee receives 100% reimbursement for courses completed satisfactorily under an Employee Development Plan leading to a degree or specialty certificate. The degree or specialty certificate can be either position- or career-related. The courses must be offered by an accredited college or university or a recognized professional society. CEU courses are reimbursable when they are a part of a Tier 1 approved Employee Development Plan.

**Tier 2:** The employee receives two-thirds reimbursement for college-level courses not leading to an academic degree or specialty certificate. Courses must be offered by an accredited college or university. CEU courses may be reimbursed when offered by a university or college continuing education program.

Specific questions and answers are discussed below.

For additional policy information see RPM 2.04 F.

## U [Eligibility](#)

### *Who is eligible for tuition reimbursement?*

Career employees who have passed probation working 50% time or greater are eligible to take college-level courses for job-related or career-related purposes, including study for a degree.

### *Who pays for the tuition reimbursement?*

Laboratory overhead pays 100% of allowable fees for approved courses of study for a degree or specialty certificate (Tier 1). The Laboratory pays two-thirds and the employee pays one-third of allowable fees for career-related college-level courses not leading to a degree (Tier 2).

### *What if a course is required for my job?*

If an employee is **required** by the Laboratory to take a college level course it is considered off-site training. The employee's Division/Department pays all relevant costs for the course, including books and travel expenses, regardless of the employee's final grade. The employee's time in the class, including travel, is considered time worked and does not count towards the six hours per week educational leave time for which the employee might otherwise be eligible. (For more information about educational leave time, see "Supervisor's Responsibilities" in authorizing time off for class, described below.

## **U Employee's Responsibilities**

### *What are the employee's responsibilities?*

The employee must:

- ♣ Discuss job and/or career related goals with supervisor.
- ♣ Develop an **Employee Development Plan** if the job or career goals include studying for a degree or specialty certificate, or if the employee will take more than three college-level courses in a year. If the goal is a career that would transfer the employee from his/her current division, he/she will need the concurrence of the department head or division director of the new division on the **Employee Development Plan**.
- ♣ Identify desired course(s) and institution to study.
- ♣ After obtaining prior approval from his/her supervisor and the Division Director or designee, submit a Request for Tuition Reimbursement Form to the **Tuition Reimbursement Program Coordinator (Mail Stop 4-230)** in the Human Resources Department.

- ♣ Remain in career status during the entire quarter or semester.
- ♣ Submit grades and receipt(s) within 45 days of completion of courses.
- ♣ Make satisfactory progress towards the degree or specialty certificate.

*Is an Employee Development Plan also required?*

An **Employee Development Plan** is required for Tier 1 and when the employee is taking more than three college level courses in a year under Tier 2.

*Are certain grades required?*

When the "A-F" grading system is used, a grade of "C" or better for undergraduate work, and "B" or better for graduate work, is required for reimbursement. If there is a choice between receiving a letter grade or a "Pass/Fail" evaluation, the employee must take the letter grade.

## U **Supervisor's Responsibilities**

*What is the supervisor's responsibility with regard to the Tuition Reimbursement Program?*

Supervisors, upon an employee's request, are encouraged to assist the employee in setting career goals where they are consistent with the employee's current position and to encourage attainment of these goals. Also encouraged, where possible, is assistance in the development of skills and knowledge that prepare the employee for additional assignments or other positions within the Laboratory. Whether participation in the program is position-related or career-related, supervisors should review tuition reimbursement requests either for relatedness to the employee's Laboratory work assignment or to career-related goals described in an approved formal **Employee Development Plan**. Supervisor approval of Employee Development Plans and requests for reimbursement must be based on the following

- Relevant to the Laboratory's mission
- Are of mutual benefit to the employee's career and the long-term interests of the Laboratory
- There is a reasonable expectation that the employee shall remain in the employ of the Laboratory for a sufficient period of time to provide a fair return for the training costs
- The proposed curriculum and timetable are realistic

- The department/division's work needs can be met during any employee absences due to attending class.
- Employees whose Employee Development Plan is not approved by their Supervisor may request a review of the denial by the Head, Human Resources, pursuant to RPM 2.04.

***Is supervisor approval necessary?***

Yes. The employee's course of study must also be approved by the employee's Division Director or Department Head and by the **Tuition Reimbursement Program Coordinator** of the Human Resources Department.

***Can time off for class be authorized?***

Time off with pay may be granted to employees when their absence will not adversely affect progress of work *and*:

- The employee remains at least 50% time in career status during the entire quarter or semester.
- The course(s) are submitted for approval before registration each academic quarter or semester.
- The course(s) cannot reasonably be taken outside the employee's scheduled working hours.
- The course(s) are not taken over the internet.
- Time off with pay does not exceed six hours per week including time for travel and registration. Time off with pay is charged to the employee's regular payroll account. Additional time required must be accounted for by an adjusted work schedule or use of vacation credit.

**u Course, Fees and Costs**

***What kinds of expenses does the Laboratory pay?***

The Laboratory reimburses course costs, including tuition, course fees, and lab fees. All other expenses such as books, entrance application fees, late fees, parking, medical and student ID fees are paid by the employee.

***Does my division pay for the cost of tuition reimbursements?***

No, the cost is charged to Laboratory overhead. If time off for work is approved, the employee's time is charged to their regular pay account.

***Can I attend any institution I choose?***

Yes, as long as the institution is an accredited college or university.

***Are there taxes on my tuition reimbursements?***

Beginning January 1, 2002, the tax laws have changed:

- If the education assistance is for undergraduate or graduate courses that are position-related the assistance is not taxable;
- If the education assistance is for undergraduate career-related courses the assistance is not taxable.

Beginning July 1, 2002, with the implementation of the University of California's Section 127 plan, education assistance for graduate level career-related courses is not taxable to a maximum of \$5,250.00 per year.

***Will the Laboratory reimburse non-resident tuition?***

No.

***What will happen if I withdraw from the course before completion and my fees cannot be returned.***

If your Department Head or Division Director confirms that you were required to withdraw because of a work assignment your course fees will be reimbursed. If you withdraw for personal reasons, the Laboratory will not reimburse your fees.

***Can I receive this laboratory aid in addition to other support such as a scholarship?***

Yes, but only to the extent that the other financial aid does not cover reimbursable fees under the Berkeley Lab program. If you are receiving other financial aid, you must provide documentation of the amount and how it will be applied to the fees.

***What if I can't afford to pay the required fees at the beginning of the semester/quarter?***

The Laboratory has established an Advance on Tuition program whereby you may be granted an advance on the reimbursable fees. The minimum advance is \$250.00. If you wish to take advantage of this program, you will need to submit a "Tuition Advancement Promissory Note" form and at the same time you submit your 'Request for Tuition Reimbursement Form' ([link](#)) for the next semester/quarter. You should submit all of these documents at least three weeks in advance to allow time for processing the advance check. Should you not receive a qualifying grade for a course, you will be required to repay the advance.

U [More questions?](#)

Ask your HR Center or call Karen Paris, Tuition Reimbursement Program Coordinator, at extension 5122.

**Ernest Orlando Lawrence Berkeley National Laboratory**  
**Employee Tuition Reimbursement Program**  
*Fostering excellence through continued education development.*