

## HOW TO APPLY FOR TUITION REIMBURSEMENT




### Before you Begin: You will need an active E-mail address.


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, write your personal e-mail address at the **top** of the **receipt**. Please do this each time you submit receipts.

### Step By Step Instructions:

1. To Login to Self-Service Go to <https://cmil.mycmsc.com/> and click on **HRMS PRD 9.1**.
2. After you login, click on **Self Service**, then **Learning and Development**, then **Tuition Reimburse Application**.
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: 9/12/12). **Be very careful to enter the correct YEAR.**
  - For Membership Dues enter the starting date of the membership/enrollment period.
  - For Licenses or Certifications, enter the effective date.
6. Click the **Add** button.
7. At the top of the page you will see your employment information and status that is current as of the starting date of your course/conference date or dues enrollment period.
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 only allows you to enter information for a second class, dues, or membership with exactly the 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 at the end and you will have to start over again!
9. In the **Details** tab, choose the **Reimbursement Type** (see page 3 for an explanation). Click on the  symbol then click on the appropriate **Type**.
  10. Type the **Ending Date** of the course, seminar, convention, conference, dues, license or certification. If it's a one-day class, type the same date. **Note:** Please see the *Tuition Benefit Amounts Summary on page 5 to see if you are eligible for dues, license or certification fee reimbursement.*
  11. Type the name of the course, seminar, convention, conference, dues, license or certification. For courses, please list the course title, not a number. For dues, list the full name of the organization.
  12. In **Costs to Reimburse** type the cost of the individual course seminar, convention, conference, dues, license or certification. Do not type a dollar sign (\$). **If you received veteran's benefits, a grant or scholarship list only the cost for each course that you personally have paid.**
  13. Type the total cost of textbooks. You may only request reimbursement for **textbooks** that are **required** for the course. Do not include sales tax or shipping/handling fees as they are not reimbursable. If you are in Local 494-Electrical Group and purchased required equipment or supplies, please enter the total in the same box as the textbooks.
  14. Click on the following check boxes that apply: *on city time, related to current job, related to a promotional opportunity.*
  15. Click on the **Justification** tab and in the box, provide an explanation of how the course relates to your present position or to a reasonable transfer/promotional opportunity within City of Milwaukee government. Fit the explanation inside the box.
  16. Go back to the **Details** tab.

- If you have no further reimbursement requests, go to #17.
  - If you have additional reimbursement request(s) with the SAME **Start Date**, click on the  symbol at the right of the row and repeat # 9 – 16. Go to #19 when finished. If you took two or more college classes that began within a week of each other in the same semester, you can use the same start date for each. Just follow the instructions above.
17. Click **Save**, a “**tuition reimbursement completion page**” pop-up will appear. Read it thoroughly and click the **OK** button to save your application, or click **Cancel** if you do not want to save or want to start over.
- If you have another reimbursement request with a DIFFERENT **Start Date**, click on **Tuition Reimburse Application** at the top of the Menu. Click on the **Add A New Value** Tab and repeat instructions #4 – 16. Repeat with each DIFFERENT **Start Date** request. Go to #18 when finished.
18. Always **Sign Out** when you are finished with self-service by clicking on the click **Sign Out** button at the top right corner and continue to #19.
19. **A RECEIPT is required for ALL reimbursement requests.** For college courses or any course longer than 3 weeks in length, you must also submit a completion statement such as a grade report, certificate or letter of completion from the school or organization. See Page 3 for more explanation. After you complete your tuition reimbursement requests – submit your receipts and completion statements as indicated below. **Send all documents at the same time.** (See page #11 on Page 4 for explanation of acceptable receipts.)
- **NOTE:** Please do not submit a “link” to the supporting documentation. You may create “print screens” of your documentation and paste them into an email message. Employee Relations staff will not click on any links provided within e-mail messages. We appreciate your cooperation.

Send your **Receipts** and **Completion Statements** to Judy Kammermann via any of the methods listed below. Be sure to use a cover page or write “**Attention: Judy**” at the top of the first page. Please do not highlight or circle text and if you send hard copies please staple together.

**E-MAIL:** jkamme@milwaukee.gov (Adobe PDF format is preferred)

**FAX:** Attention: Judy at 286-0800

**INTEROFFICE:** Attention Judy to DER, City Hall, Room 706

**U.S. MAIL:** Judy Kammermann, DER, 200 E. Wells St., Room 706, Milwaukee WI 53202-3554

**IN PERSON:** City Hall, Room 706, 8:00 am – 4:45 pm weekdays

### **After You Request Reimbursement**

1. After you complete your application and submit the receipts and completion statements, Employee Relations will review your reimbursement request. Employee Relations reviews requests in the order that supporting documentation is received.
2. Employee Relations will send you an e-mail when your reimbursement request and supporting documentation have been reviewed and will tell you if your reimbursement has been approved.
3. *If approved*, the reimbursement is added to your payroll check and **no** taxable earnings and **no** withholdings will be taken.
4. To see the approved amount and the check date:
  - Login to Self Service then click on *Main Menu > Self Service > Learning and Development > Tuition Reimburse Application*. Click the **Search** button. Click on the record with the Starting Date of your approved application. At the bottom of the screen you will see the Payment Amount and the Date of Pay.
5. To check your available balance at any time, Login to Self Service then click on *Main Menu > Self Service > Learning and Development > Tuition Reimburse Application*. Click on the **Search** button. Click on a record with

the current fiscal year. 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.

#### **DO NOT Request Reimbursement for These Types of Courses/Awards**

- **In-house training courses** announced on the Employee Relations' web site
- Courses that have been paid by your department **"upfront"**
- **PDA: Professional Development Award** – Eligible employees include Officials and Administrators, Professionals, and certain exempt Protective Service employees. Please complete the form found at: [www.milwaukee.gov/der/compensation](http://www.milwaukee.gov/der/compensation)
- **OSCEI: Office Support Continuing Education Incentive**. The Guidelines and Eligible Job Classifications can be found at [www.milwaukee.gov/der/Forms](http://www.milwaukee.gov/der/Forms) (Form ER-300).

#### **Completion Statements**

- **College-Level Courses:** Along with the tuition and/or textbook receipt, submit a copy of the final Grade Report. A grade of "C-" or above is required. *Mid-term grades are not acceptable.*
- **Courses more than 3 weeks in length, non college-level:** Along with the tuition and/or textbook receipt, submit a copy of a grade report, certificate or letter showing successful completion.
- **Membership Dues:** Only a copy of the receipt is required.
- **Licenses:** Only a copy of the receipt is required.
- **Certification/Exam Fees:** Along with a copy of the receipt, submit a copy of the certification, or if an exam was taken, a copy of a document showing proof that you **passed** the exam.



#### **Reimbursement Types**

- **COLLEGE:** All college courses
- **SMNR:** Seminars, conferences, conventions, or non-college courses
- **DUES:** Membership Dues Reimbursement of job-related, professional organizations
- **LICENSES:** Job or promotion related licenses
- **CERTIF:** Job or promotion related Certifications
- **Do Not** Select the following **Types** as they are for Employee Relations' use only: **COURSE, OSCEI, PDA**

#### **How to View Your In-House Training History**

Through self-service you can view your in-house training history from 1997 to the present as well as view any current class enrollments. This will only include training courses that were sponsored or announced by Employee Relations.

**Path:** Main Menu > Enterprise Learning > Result Tracking > Review Training Summary

1. Click the **Search** button and you will see the list of in-house training programs you completed or are currently enrolled in. Click on the **Show All Columns** icon  next to the **Status** tab.
2. You can download your course history to Microsoft Excel. Click on the **download** icon .

## ADMINISTRATIVE GUIDELINES

1. If you want to know in advance if a tuition reimbursement request will be approved, call 286-3650 or 286-3387; or send e-mail request to either [jkamme@milwaukee.gov](mailto:jkamme@milwaukee.gov) or [aknick@milwaukee.gov](mailto:aknick@milwaukee.gov).
2. Request Tuition Reimbursement as soon as possible, but within four (4) months of completing the course, membership or certification.
3. Reimbursements are approved for courses, seminars, conferences or conventions that are job or promotion related. For college-level elective courses, only courses that satisfy the General Educational Requirements for a degree will be approved for reimbursement. Certain courses will **not** be approved for reimbursement including, but not limited to, sports, fitness, and recreation classes.
4. Textbooks are reimbursable only if they are required by the instructor for a successfully completed course.
5. All courses of more than three (3) weeks in length require proof of successful completion. A grade report must be submitted for any college course no matter the length.
  - A grade of "C-" or higher is required for reimbursement of 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 written statement from the school or organization is required for reimbursement.
  - Conferences, conventions and seminars of less than three (3) weeks in length do not require a completion statement.
6. For Membership Dues reimbursement, 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.
7. Reimbursement may be requested for job or promotion related Licenses and Certifications. Represented sworn personnel are not eligible for License or Certification reimbursement; however classes that lead to license or certification are eligible as long as they are related to their present position or to a reasonable transfer/promotional opportunity within City of Milwaukee government.
8. Reimbursement is based on the calendar year of January to December and is always applied to the year in which the course, seminar, conference or convention begins, no matter when reimbursement is requested or fee was paid. Membership Dues are applied to the year in which the enrollment period of the membership begins, no matter when the dues were paid.
9. If you start 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 request reimbursement within four months of the end of the course. However, if you start a course while on an unpaid leave of absence or layoff you are not eligible to receive tuition reimbursement.
10. Tuition Benefits only cover expenses paid by the employee and do not cover tuition paid for through grants, scholarships and veteran's benefits. An employee can apply for the portion of tuition that is not covered by grants, scholarships or veteran's benefits.
11. A receipt must be provided for all reimbursement requests. However, in-house training courses offered through Employee Relations do not require a receipt as the registration is paid up-front by Employee Relations and deducted from your Tuition Benefit balance.
  - 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 the amount paid.
  - Unacceptable receipts include registration forms and invoices requesting payment, check registers or carbons, or receipts that show payment was made by another person.
12. Tuition Reimbursement are not taxed. No withholding tax is taken from you paycheck.

13. Part-Time Employees are eligible to receive prorated Tuition Benefits provided they work a minimum of 20 hours per week.
14. Tuition reimbursement does not cover:
- software, personal computers or laptops, non-required textbooks, union dues, finance charges, sales tax, shipping/handling charges, late fees, administrative fees, I.D. fees, travel expenses for lodging, meals, or mileage, parking fees, magazine/journal/ periodical subscriptions, equipment or supplies. For sworn personnel, reimbursement requests for dive classes will cover the cost of the class and will **not** cover equipment, supplies or certification fees.
15. The City of Milwaukee Tuition Benefit Program does not cover employees of Milwaukee Public Schools, HACM, RACM, WCD or MEDC.

## TUITION BENEFIT AMOUNTS SUMMARY

### GENERAL CITY EMPLOYEES:

- \$1200 per calendar year for tuition and required textbooks.
- Up to \$600 of tuition benefits per calendar year for job or promotion related certifications and license fees
- Up to \$1,200 of tuition benefits per calendar year for job-related membership dues.
- Police Aides shall be eligible for a combined maximum of \$2,400 during the first two calendar years of employment.

**MUNICIPAL ATTORNEYS and TEAM:** 2012 balance is determined based on amount used in 2011.

### SWORN PERSONNEL:

#### Chief Officers Association

- \$1200 per calendar year for tuition and required textbooks
- \$600 of tuition balance for membership dues

#### Local 215, Milwaukee Professional Firefighters' Association, IAFF, AFL-CIO (1/1/10 – 12/31/12)

- \$925 per calendar year for tuition and required textbooks

#### Milwaukee Police Association, Local #21, IUPA, AFL-CIO (1/1/10 – 12/31/12)

- \$1200 per calendar year for tuition and required textbooks

#### Milwaukee Police Supervisors' Organization (1-1-10 to 12-31-12)

- \$1200 per calendar year for tuition and required textbooks
- \$150 of tuition balance for membership dues

### MISCELLANEOUS UNIONS:

#### Local 494, IBEW, AFL-CIO, Electrical Group (06-01-10 to 05-31-12)

- \$1000 per calendar year for tuition and required textbooks or equipment
- \$100 of tuition balance for membership dues in the following organizations: Electrical Maintenance Engineers, Int'l Electrical Inspectors, or others approved by employee's Division Head.

#### Milwaukee Building and Construction Trades Council, AFL-CIO (8/1/10 – 7/31/12)

- \$700 per calendar year for tuition of which up to \$150 may be used for required textbooks

- City of Milwaukee labor contracts can be found at: <http://city.milwaukee.gov/der/LaborContracts>
- Updates to this document can be found at: <http://city.milwaukee.gov/der/TuitionBenefit>