1. New employees (eligible for benefits) may begin using the tuition benefit as of their start date; however, courses, seminars and conferences must begin on or after the start date. Memberships, certifications and licenses must be effective and paid for on or after the start date (not all bargaining units are eligible; see Amounts Summary on page 3).

2. More than half-time and half-time employees are eligible for the Tuition Benefit on a pro rata basis.

3. Employees going from non-benefit to benefit are eligible for courses, seminars and conferences that began on or after the benefits effective date. Memberships, certifications and licenses must be effective on or after the benefits effective date (not all bargaining units are eligible; see Amounts Summary on page 3).

4. The reimbursement is added to the net total of your regular paycheck; no withholding tax is deducted.

5. To know in advance if a reimbursement request will be approved, call or e-mail Tiffany Marsh at 286-3650 (tlhanki@milwaukee.gov) or Andrea Knickerbocker at 286-3387 (aknick@milwaukee.gov).

6. THE TUITION BENEFIT DOES NOT COVER and is not limited to the following:
   - Costs paid upfront by department
   - Driver’s and motorcycle license
   - Out-of-State licenses
   - Software, PCs, laptops, tablets, calculators
   - Supplies and equipment
   - Advanced standing fees (i.e. work experience, transfer of credit, credit by examination, etc.)
   - Finance charges, sales tax, shipping and handling fees, late fees
   - Travel expenses (parking, lodging, meals, mileage, transportation, etc.)
   - Transcript fees, graduation fees, ID fees, student accident insurance
   - Subscriptions to magazines, journals or periodicals
   - Non-required textbooks
   - Union dues

7. COLLEGE COURSE (and NON-CREDIT), SEMINAR and CONFERENCE REIMBURSEMENT:
   a. Must be related to your current position or to a reasonable transfer/promotional opportunity.
   b. Is based on the calendar year and is applied to the year in which a course, seminar or conference begins.
   c. The application and supporting documents must be submitted as soon as possible, but no later than *four (4) weeks* of the completion date. Contact DER (see #5 above) if you missed the deadline.
   d. Certain course subjects that are not approved include, but are not limited to sports, fitness and recreation.
   - Real Estate courses must be directly related to an employee’s current position.
   - *Sworn personnel*: requests for *dive* classes will only cover the cost of the class and required textbooks and not supplies, equipment, exam or certification fees.
   e. If you attend a course, seminar or conference while on an unpaid leave of absence or layoff you are not eligible for the tuition benefit.
   f. If you begin a course prior to being seasonally laid off prior to taking an unpaid leave of absence, you will receive reimbursement when you return to work. You must still complete the reimbursement application and submit the supporting documents within *four (4) weeks* of the course or seminar completion.
   g. If pursuing a certificate program or college degree, your major must be related to your current position or to a reasonable transfer/promotional opportunity.
   h. If you take a continuing education course to maintain a license or certification, the course must be related to your present position or a reasonable transfer/promotional opportunity.
   i. Course, seminar, or conference fees paid *out-of-pocket (including student loans)* are eligible for the Tuition Benefit.
   - Tuition expenses paid for by a grant, scholarship, veteran’s benefit, or paid upfront by your department are not eligible for the Tuition Benefit.
   j. Textbooks for a successfully completed course are reimbursable only if required by the instructor.
   k. Courses of more than three weeks in length and all college courses require a completion statement (i.e., certificate, letter of successful completion or grade report).
   - For college courses a copy of the grade report must be submitted along with the tuition/textbook receipts.
   - A grade of “C-” or higher is required for 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 statement of completion from the school or organization must be submitted along with the tuition/textbook receipts.
   - Conferences, courses and seminars of less than three weeks in length do not require a completion statement; only paid receipts (see #11, page 2).
8. **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.
   - Reimbursement is based on the calendar year. Membership Dues are applied to the year the enrollment period begins, not when the dues were paid.
   - The application and paid receipt must be submitted as soon as possible, but no later than *four (4) weeks* of start date of the membership. **Contact DER (page 1, #5) if you missed the deadline.**
   - **Not all bargaining units are eligible.** See the Amounts Summary on page 3.

9. **LICENSE REIMBURSEMENT:**
   - Must be job or promotion related.
   - If you take a continuing education course to maintain a license or certification, the course must be related to your present position or a reasonable transfer/promotional opportunity.
   - Reimbursement is based on the calendar year and is applied to the effective date of the license, not when the license was paid for.
   - Out of state licenses are not approved for reimbursement.
   - Real estate related licenses and certifications must be directly job related.
   - **Commercial Driver's License (CDL):** reimbursement will be approved for a Commercial Driver’s License Hazardous Material Endorsement, Tanker Endorsement, as well as Class A or B. Reimbursement includes the cost of the written test, license, fingerprinting and road test fees, if applicable. A copy of the license must be submitted with the paid receipt. *Testing fees are only reimbursable if the test was passed.*
   - The application, paid receipt and copy of the license must be submitted as soon as possible, but no later than *four (4) weeks* of the effective date of the license. **Contact DER (page 1, #5) if you missed the deadline.**
   - Not all bargaining units are eligible for license reimbursement. See the Amounts Summary on Page 3.

10. **CERTIFICATION AND EXAM REIMBURSEMENT:**
    - Reimbursement is based on the calendar year and is applied to the year the Certification was achieved. For exams and related study materials, reimbursement is applied to the year the exam was taken and passed.
    - Represented sworn personnel are not eligible for Certification or Exam reimbursement; however, classes that lead to a certification are eligible as long as they are job-related or relate to a reasonable transfer/promotional opportunity. See the Amounts Summary on page 3.
    - **If you fail an exam and must re-take it, you can only be reimbursed the fee for the exam that was passed.**
    - If you obtain a certification or take an exam while on an unpaid leave of absence or layoff you are not eligible for reimbursement.
    - The application, paid receipt, proof of certification or passing an exam, and related study materials must be submitted as soon as possible, but no later than four (4) weeks of receiving the certification or passing an exam. Submit all supporting documents together. **Contact DER (page 1, #5) if you missed the deadline.** Applications can be denied if it's after the deadline. (For example, you completed your class or course in May but you submit your documents in November.) **You will be denied.**

11. **EXPLANATION OF ACCEPTABLE RECEIPTS:**
    - **Acceptable** receipts include cash register, money order, official receipt provided by the school or organization, proof of approved student loan, credit card statement, and canceled check (not check carbons). A receipt must show payment was made as well as the amount paid.
    - **Unacceptable** receipts include registration forms and invoices requesting payment or showing a balance is due, check registers and carbons, or receipts that show payment was made by another person. Receipts must be on the school or organization's letterhead. Receipts on a plain piece of paper are not acceptable.

12. Employees in the Milwaukee Police Association and Milwaukee Police Supervisor’s Organization, in accordance with the union contract, must remain in service for a 6-month period after receiving tuition benefits or the amount reimbursed will be deducted from the employee’s final paycheck.
    - Employees of Local 215, MPFFA, must remain in service for a 1-year period.
    - **Exceptions are:** Retirements, positions eliminated due to budget cuts, reimbursement used by the employee at the department's request, or reimbursement that was directly job-related.

13. If you separate from City service (for any reason), the reimbursement application and supporting documents must be submitted at least one (1) pay period prior to going off payroll. You are not eligible to receive reimbursement if you separate from City service (for any reason) prior to completing a course, seminar or conference.

*For the following represented sworn personnel, the deadline for submitting applications and supporting documents is **eight (8) weeks:** MPA, MPSO, MPFFA, in accordance with the union contract.
TUITION BENEFIT AMOUNTS SUMMARY

GENERAL CITY EMPLOYEES:

- A maximum of $1,200 per calendar year for tuition, required textbooks and membership dues.
- Up to $600 (of the maximum) per calendar year for job or promotion-related certification and license fees (including related exam fees and study materials, provided the exam was passed).
- Police Aides are eligible for a combined maximum of $2,400 during the first 2 calendars years of employment.
- Part-time (regular) employees working at least 20 hours per week are eligible to receive prorated Tuition Benefits.

SWORN PERSONNEL:
Members of the following bargaining units are not eligible for certification, exam or license fee reimbursement. Members of MPSO are eligible for Membership Dues reimbursement.

| Local 215, Milwaukee Professional Firefighters' Association, IAFF, AFL-CIO (1/1/19 – 12/31/20) | $925 per calendar year for tuition and required textbooks |
| Milwaukee Police Association, Local #21, IUPA, AFL-CIO (1/1/19 – 12/31/20) | $1500 per calendar year for tuition and required textbooks |
| Milwaukee Police Supervisors’ Organization (1-1-18 to 12-31-20) | $1500 per calendar year for tuition and required textbooks |
| | $150 of the $1500 maximum for membership dues |

HOW TO APPLY FOR TUITION REIMBURSEMENT IN SELF-SERVICE

Do not apply for reimbursement if fees/tuition were paid upfront by your Department or were covered by a grant, scholarship or veteran’s benefits. The Tuition Benefit may only be used for out-of-pocket expenses paid by you directly.

All correspondence regarding your application is sent to your City e-mail address.
- If you do not have a City e-mail account and have a private e-mail account, please write your e-mail address at the top of the receipt. Do this each time you apply for reimbursement.

TO CREATE AN APPLICATION:
1. Login to your Self-Service account at www.milwaukee.gov/selfservice
   - Or go to https://prd.com.mycmsc.com/ and then select HRMS PRD 9.2.
2. Click on Main Menu > Self Service > Learning and Development and then Tuition Reimburse. Application
   - Save to “Favorites” for quick navigation the next time you apply.
3. You will see two tabs, Find an Existing Value and Add a New Value.
4. To create an application, click on Add a New Value.
5. Enter the Course, Seminar or Conference Start Date (month/day/year).
   - For Membership Dues enter the effective date of the membership; not the date paid.
   - For Licenses, Certifications, Exams, enter the effective date; not the date paid.
6. Click the Add button.
   - An example of a tuition reimbursement application is on the last page.
7. At the top of the page you will see your job data/employment status current as of the start date of the reimbursement request.
8. There are four tabs: Details, Justification, Approvals, Status.
9. In the Details tab, choose a reimbursement Type by clicking the symbol and then click on the appropriate Type. (An explanation of Types is at the bottom of the next page.)

10. Enter the End Date of the course, seminar, conference, dues, license or certification.

11. Enter the TITLE of the course, seminar, conference, dues, license or certification. For membership dues, list the full name of the organization.

12. For a college course, adding the number of credits is optional. Enter a whole number; do not type 3.0, 4.0, etc. or you will get an error message and will not be able to save the application until you fix the error.

13. In Costs to Reimburse enter the cost for the course, seminar, conference, dues, license or certification. Do not type a dollar sign ($). If you received veteran’s benefits, grants or scholarships for tuition list only the cost of the course that you paid for out-of-pocket or received a student loan (see page 1, 7i).

14. In Books or Supplies Cost enter the cost of the required textbooks. Do not include sales tax or shipping and handling fees.

15. Check all boxes that apply: on city time, related to current job, related to a promotional opportunity, etc.

16. Go to the Justification tab and in the box, explain how the course, certification, license or exam relates to your current position or to a reasonable transfer/promotional opportunity. If the course is for a college degree or part of a certificate program, also state your major area of study or degree.

17. If you have no further reimbursement requests, go to #18.
   - If you have additional reimbursement requests with the SAME Start Date, go back to the Details tab and click on the symbol at the right side of the row and repeat steps 9 – 16. Note: If you took more than one college class that began a few days apart in the same semester, you may use the same start date and add an additional row for each class.
   - If you have another reimbursement request with a different Start Date, follow #18 below, then go back to #2 and start a new application. Repeat this with each different Start Date.

18. There are two (2) parts to saving an application!
   1. Click the Save button. A tuition reimbursement completion page will appear.
   2. Read it and click the OK button to complete and save the application. If you do not want to save the application, select Cancel instead of OK.

19. You are done! Please log off of self-service by selecting the Sign Out button at the top right corner.

20. Continue to Page 5 for How to Submit the Supporting Documents and What Happens Next.

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**EXPLANATION OF REIMBURSEMENT “TYPES”**

<table>
<thead>
<tr>
<th>COLLEGE</th>
<th>SMNR</th>
<th>DUES</th>
<th>LICENSES</th>
<th>CERTIF</th>
<th>COURSE</th>
<th>PDA</th>
</tr>
</thead>
<tbody>
<tr>
<td>College courses</td>
<td>Seminars, conferences and non-credit courses</td>
<td>Job or promotion related professional organizations</td>
<td>Job or promotion related licenses (for courses related to a license use SMNR)</td>
<td>Job or promotion related certifications and exams (for courses related to a certification or exam use SMNR)</td>
<td>for Employee Relations’ use only; do not use this type</td>
<td>for Employee Relations’ use only; do not use this type</td>
</tr>
</tbody>
</table>

Not all bargaining units are eligible for Membership Dues, License or Certification/Exam fee reimbursement (see the Tuition Benefit Amounts Summary on page 3).
HOW TO SUBMIT THE SUPPORTING DOCUMENTS

Submit Receipts (page 2, #11) and Completion Statements (page 1, #7) using one of the following methods.

<table>
<thead>
<tr>
<th>Method</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-MAIL:</td>
<td>Attachments must be in a viewable format such as a PDF or Microsoft Word.</td>
</tr>
<tr>
<td><a href="mailto:TLhanki@milwaukee.gov">TLhanki@milwaukee.gov</a> (preferred method)</td>
<td>☑ You may paste or attach screen shots or scans of documents provided they are legible.</td>
</tr>
<tr>
<td></td>
<td>☑ Please type “tuition reimbursement docs” in the subject line; <strong>do not leave it blank.</strong></td>
</tr>
<tr>
<td></td>
<td>☑ Links to a document or website are not acceptable; the documents must be attached.</td>
</tr>
<tr>
<td>FAX (414) 286-0203:</td>
<td>Please use a cover page and address it to Tiffeny Marsh.</td>
</tr>
<tr>
<td>INTEROFFICE MAIL:</td>
<td>ATTN: Tiffeny Marsh, DER – City Hall, Room 706</td>
</tr>
<tr>
<td>U.S. MAIL:</td>
<td>ATTN: Tiffeny Marsh 200 E. Wells St, Room 706, Milwaukee WI 53202-3515</td>
</tr>
<tr>
<td>IN PERSON:</td>
<td>ATTN: Tiffeny Marsh, City Hall – Room 706 (7:30 am – 4:00 pm weekdays)</td>
</tr>
</tbody>
</table>

“I COMPLETED THE REIMBURSEMENT APPLICATION AND SUBMITTED THE SUPPORTING DOCUMENTS…WHAT HAPPENS NEXT?”

1. In general, your application will be reviewed within **10 business days** after receipt of your supporting documents.
2. After the review, you will receive a “determination” via e-mail. **Be advised, payments can take up to 2 pay periods.**
   - For approved applications, the e-mail will include the amount approved, paycheck date of the reimbursement, remaining balance for the current calendar year, and any applicable comments.
   - If your application is denied, supporting documents are missing or unacceptable, or if further information is needed, you will be contacted via e-mail.

To view your applications, log in to Self Service (Milwaukee.gov/selfservice) then go to: Main Menu > Self Service > Learning and Development > Tuition Reimburse Application.
   - Click the Search button. You will see a list of all tuition reimbursement applications filed in self-service since 2010.
   - Click on a header if you want to sort the applications.
     - Example: if you want to sort your applications by start date click on the Start Date header, then click on your Employee ID number on the left of the row to view the application.

➤ The most recent version of this document can be found at: www.milwaukee.gov/der/TuitionBenefit
➤ The most recent version of general Self Service General Instructions can be found at: www.milwaukee.gov/der/SelfService
TUITION BENEFIT PROGRAM

TUITION REIMBURSEMENT APPLICATION EXAMPLE

Below is what you will see after you “Add a New Value” (page 3, #6)

[Image of Oracle application interface]

The Job Data displayed is based on the “start date” entered for the application.

Click on the magnifying glass then select the appropriate reimbursement “type.” (see bottom of page 4 for explanation of types)

Fill in the appropriate boxes then go to the “Justification” tab next to “Details” on the far left.

When you have completed the Details and Justification tabs, click the SAVE button. A completion page will come up. Review it, and then click the OK button. The application is now saved. If you click the CANCEL button, the application will not be saved.

Please note that when you click the OK button, you are acknowledging that you have read the Tuition Reimbursement Instructions and Administrative Guidelines and agree to abide by them.

Click the plus sign to add another row only if you have another course with the exact same start date. See page 4, #17, 1st bullet.