



EMPLOYEE DEVELOPMENT FUNDS PROGRAM POLICY

EXEMPT FROM BARGAINING UNIT EMPLOYEES

Effective: April 4, 2011

PROGRAM PURPOSE

The Exempt Development Funds for exempt employees, authorized by Ohio Administrative Code 123:1-39-01 and governed by this policy, provides funding for professional growth and development through participation in:

- Coursework that provides academic college credit
- Continuing education activities that include professional conferences, seminars, workshops, work skills, computer and technical training
- Financial assistance is on a reimbursement basis, only

1. EMPLOYEE ELIGIBILITY CONDITIONS

All full-time and part-time permanent employees of a participating agency (listed at end of this document), who are paid directly by warrant of the director of Office of Budget and Management and are exempt from collective bargaining, who:

- A. completed their initial probationary period
- B. are in active pay status, defined as not being on partial or full-time disability leave, workers' compensation leave, administrative leave or other leave of absence at the time of application and/or beginning of the program

2. COURSE/EVENT ELIGIBILITY

Courses/events are expected to provide knowledge and/or skills, which could reasonably be expected to relate to any of the major job classifications currently used in the State of Ohio. The following educational activities are eligible:

A. Eligible tuition reimbursement courses include:

- i. Coursework must provide academic college credit
- ii. If grades are given, the employee must attain a "C" or better, or receive a "pass" if assessed on a pass/fail basis
- iii. Electives and prerequisites that are part of an approved degree program are eligible for reimbursement
- iv. A distance education course or online course is covered, if provided by an accredited institution, provides college credit and is completed within the same fiscal year
- v. Coursework must be provided by an Ohio independent proprietary school/college recognized by the United States Department of Education; or be accredited by one of the Regional Institutional Accrediting Agencies

B. Eligible events include:

- i. Seminars, workshops and conferences
- ii. Courses preparing for or leading to licensure or certification
- iii. Work skills or computer/technical skills training
- iv. Courses offering continuing education units required for licensure and many disciplines
- v. Online courses are eligible if completed in the same fiscal year and offer continuing education units (CEUs) or certificate of completion

- vi. Courses providing knowledge and/or skills, which could reasonably be expected to relate to any of the major job classifications currently used in the State of Ohio
- vii. Participants may not use reimbursement for the same event more than once per fiscal year

3. REIMBURSEMENT ELIGIBILITY & LIMITS

- A. Full-time, permanent employees are eligible to receive for tuition reimbursement a maximum of \$3,000 per fiscal year and for professional development events a maximum of \$1,500 per fiscal year
- B. Part-time, permanent employees are eligible to receive for tuition reimbursement a maximum of \$1,500 per fiscal year and for professional development events a maximum \$750 per fiscal year

NOTE: DISBURSEMENT OF FUNDS IS CONTINGENT UPON THE AVAILABILITY OF FUNDS

4. WHAT IS NOT ELIGIBLE FOR REIMBURSEMENT

A. TUITION REIMBURSEMENT

- i. Application fees, registration fees, graduation fees, parking fees, non-instructional field trips, flight instruction airtime fees, and other related expenses
- ii. Travel expenses e.g. parking, travel, food or lodging expenses
- iii. Reimbursement is not available for activities paid for by scholarship, grants or agencies

B. EVENTS

- i. Fees for licenses or certifications, testing or examination fees, non-instructional fees, hardware, commercial software fees
- ii. Travel expenses e.g. parking, travel, food or lodging expenses
- iii. Books
- iv. Equipment
- v. Memberships
- vi. Reimbursement is not available for courses/activities paid for completely by scholarship, grants or agencies

5. APPLICATION AND REIMBURSEMENT PROCEDURE

A. APPLICATION PROCEDURE

- I. Pre-approval of applications for tuition reimbursement and event reimbursement is **optional**
- II. The benefits of pre-approval are:
 - a. Confirms program funds are available and applicant is within individual limits
 - b. Reserves the individual's funds
 - c. Verifies that program rules are met and course/event is eligible for reimbursement
 - d. Complete and accurate applications will be approved on a "first come," "first served" basis provided funds are available
 - e. If the pre-approved course or event is cancelled or rescheduled more than 30 days, the application pre-approval is void. Pre-approved applications cannot be transferred to a different course or event.
 - f. Employees who separate employment or are moved to the bargaining unit due to a layoff and who were pre-approved and started the class/event will be reimbursed if all other requirements are met.
- iii. For an application to be pre-approved it must be received by the EDF office 10 days before the course/event start date
- iv. Applications are available on the EDF website (epdp.das.ohio.gov)

- v. Applications must be submitted by email to EDFunds@das.ohio.gov
- vi. All documents must be submitted electronically. Copying documents into a Word file, scanning or converting documents into a PDF are all acceptable practices.
- vii. Incomplete applications or applications with errors will be automatically denied and discarded. An email describing the reason for denial will be sent to the sender of the form. A new application must be resubmitted with all fields completed or corrections made to be considered for reimbursement.

WARNING: If the employee chooses to not use pre-approval they risk exhausting individual fund limits or not meeting eligibility rules, thus not qualifying for reimbursement.

B. REIMBURSEMENT PROCEDURE

The following items must be forwarded electronically within forty-five (45) days of the completion of the course/activity:

- i. Completed application form (unless pre-approved)
- ii. Itemized invoice including provider name, the activity name and date of activity
- iii. Proof of cost of activity
- iv. Proof of payment of activity cost
- v. Proof of attendance
- vi. A grade including pass/fail is required for tuition reimbursement. Electronic grade documentation is sufficient if it is from the registrar of the institution

C. PAYMENT

For first time users to receive payment, a vendor direct deposit form should be completed and returned directly to the Office of Budget and Management (OBM). If an OBM deposit form is not filed, your reimbursement may be delayed. The form and instructions may be found at <http://obm.ohio.gov/MiscPages/Forms/default.aspx> [Authorization Agreement for Direct Deposit of EFT Payments](#) (OBM-1234)

D. REIMBURSEMENT TIME LIMITS

- Request for reimbursement and reimbursement documents must be submitted within **forty-five (45) days** of the conclusion of the course or event. Contact the EDF office **before** starting a course or event if an exception is required. Fiscal year crossovers may be an exception to this rule – see the next paragraph.

NOTE: ALL DOCUMENTS ARE REQUIRED TO BE SUBMITTED IN ELECTRONIC FORMAT AND EMAILED TO EDFUNDS@DAS.OHIO.GOV

FOR YOUR PROTECTION, DELETE OR BLACK OUT ANY SOCIAL SECURITY, CREDIT CARD OR CHECKING ACCOUNT NUMBERS ON YOUR DOCUMENTS BEFORE SUBMISSION!

APPEAL

Any employee who has been denied approval for use of EPDP funds or reimbursement may appeal to the manager of the Employee Development Fund. An appeal form is available on the EDF website. If the appeal is denied by the manager the employee may appeal to the administrator of the Department of Administrative Services' Human Resources Division, Office of Learning and Professional Development. The administrator's decision will be final.

Please note: To ensure that we are receiving the correct data needed to accurately process your reimbursement, we will not accept previous versions of the application forms. You will be asked to resubmit your application on the current form posted on the website.

The following agencies are **NOT** participating in the Employee Development Funds program:

- Attorney General's Office
- Treasurer's Office
- Auditor's Office
- Judiciary
- Supreme Court
- Court of Claims
- Judicial Conference
- Senate
- House of Representatives
- Joint Legislative Ethics Commission
- Joint Commission on Agency Rule

Please Note: The Governor's office and the Secretary of State's office **are** participating in the program