

**MIAMI COUNTY APPLICATION FOR EDUCATIONAL ASSISTANCE**  
(See attached procedures before completing)

**Part 1: Request for Approval of Courses and Institution**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Department: \_\_\_\_\_ Job Title: \_\_\_\_\_

Date of Full Time Hire: \_\_\_\_\_ Phone Number: \_\_\_\_\_

(Must have at least two (2) years of regular full time service to be eligible for educational assistance)

Academic Institution: \_\_\_\_\_

Full Title and Number of Course	Dates	
	From	To

Why are you taking this course? \_\_\_\_\_

Do you intend to seek a degree? ""Yes ""No If so, what kind:

Major \_\_\_\_\_ Minor \_\_\_\_\_ When will you complete your degree requirements? \_\_\_\_\_

What is the approximate total cost of course(s) – tuition and texts? Amount \$ \_\_\_\_\_

Are you eligible for any other outside financial assistance? ""Yes ""No "Co ount \$ \_\_\_\_\_ Source: \_\_\_\_\_

I understand that I will be required to sign an agreement with Miami County agreeing to continue to work for Miami County for a period of two (2) years after reimbursement of tuition is made by Miami County.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

Employee has completed at least 2 years of regular service: Yes No

Employee has a "satisfactory" or better rating on last performance evaluation: Yes No

Recommend above request and affirm that the course(s) requested is directly related to the employee's current position.

Do not recommend the above request, due to the following: \_\_\_\_\_

\_\_\_\_\_  
Department Director Signature

\_\_\_\_\_  
Date

I hereby approve \_\_\_\_\_ deny \_\_\_\_\_ educational assistance for the above named employee.

Educational assistance reimbursements made to date: \_\_\_\_\_

\_\_\_\_\_  
Human Resources Signature

\_\_\_\_\_  
Date

## Part 2: Reimbursement Request

Amount of outside financial assistance received in connection with courses listed above: \$ \_\_\_\_\_

Does completion of above course(s) make you an immediate candidate for a degree/diploma? Yes \_\_\_\_ No \_\_\_\_

Total credit hours completed to date: \_\_\_\_\_  
(semester/quarter)

Attached are copies of grade sheets and receipts for the courses and fees approved. I request reimbursement in the amount of \$ \_\_\_\_\_

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

## Part 3: Reimbursement Notification

Total Covered Expenditure \$ \_\_\_\_\_

Outside Assistance \$ \_\_\_\_\_

\*Total Reimbursement \$ \_\_\_\_\_

Receipts/Grades Returned: \_\_\_\_\_

Please process payment in the amount of \$ \_\_\_\_\_ to the above named individual.

Approved: \_\_\_\_\_  
Human Resources

\_\_\_\_\_  
Date

\*Deduct amount received or to be received from government or other educational benefits.

## **EDUCATIONAL ASSISTANCE**

Application for approval of courses and for reimbursement must be presented in accordance with the following procedure. Questions about the Educational Assistance Program may be directed to your Department Director or Human Resources.

Employees must have regular full-time status, must not be on disciplinary probation, must have at least two (2) years of regular service with Miami County, and have had a "satisfactory" or better rating on his/her last performance evaluation. Coursework or degree program shall be directly related to the employee's job, shall be for college, technical or vocational school credit, and shall be approved by the Department Director. Full reimbursement of covered expenses upon successful completion of courses is subject to the following:

1. The County will reimburse the employee at the completion of the course (the final grade in course must be at least "C" for undergraduate and vocational coursework and at least "B" for graduate coursework) for tuition and fees related to the course, not to exceed \$800/term. The employee may not receive more than twenty four hundred dollars (\$2400) in reimbursement in one (1) calendar year. No reimbursement will be made for travel expense, meals, supplies, late registration, deferred payments, optional activity fees, graduation or special examination fees, or other expenses not specifically covered.
2. Educational assistance will not be provided for courses which are: (1) commenced prior to employment, or (2) not completed satisfactorily, or (3) completed after termination of employment, or (4) completed during a leave of absence.
3. Reimbursement will be reduced by the amount of scholarship grants, veterans' educational benefits or other outside financial assistance.

### **Procedure**

Prior to enrollment:

1. Complete Part 1 of the Application for Educational Assistance.
2. Submit the application form to your Department Director for approval.
3. Forward the application to Human Resources for final approval.
4. The approved Application for Educational Assistance will be returned to you. Retain this form until you have completed your course(s).

Within 60 days after you have completed the course(s):

1. Complete all of Part 2 of approved Application for Educational Assistance. (Failure to do so will result in delay of reimbursement.)
2. Submit application form and copies of grade card and receipts to Human Resources. (If you receive other financial assistance, you must also submit evidence of the amount of this assistance.)
3. Human Resources will complete Part 3, advising you of the date on which you will receive your reimbursement.

### **Reimbursement**

You may be eligible to deduct from taxable income un-reimbursed expenses for education that helps you maintain or improve skills in your present job. Further information on the deductibility of educational expenses is contained in IRS Publication 508 (Tax Information on Education Expenses), which is available at [www.irs.gov](http://www.irs.gov).