



Educational Assistance Plan Course Application

Please complete this application for approval of a course, conference, seminar or workshop under the Educational Assistance Plan. This application must be approved by your department and the Office of Human Resources **prior to commencing the course**. Please refer to the reverse-side of this application for eligibility and course payment information, and the Educational Assistance Plan Document for additional important information.

Name: _____ College Telephone #: _____
(Please print)

Date of Hire: _____ Employment Status: Full-time Part-time

Department: _____ Current Position: _____

Course Details

Type of course/seminar: Undergraduate Graduate Conference/Seminar/Workshop

Name of the institution sponsoring the course/seminar: _____

Title of the course/seminar: _____

Title of the course/seminar: _____

Cost for tuition, registration or related fees: \$ _____ (you agree this amount reflects any waived fees or other financial aid)

Do you wish to receive an advance payment for the course? Yes No

When will the class be held? (Month/Year) Commence: _____ End: _____

Is this course part of a degree program? Yes No

If yes, has the degree program been approved by HR? Yes No (If yes, omit justification section)

Course/Seminar Justification

Courses taken through the Educational Assistance Program are reimbursed at a level based on the relevancy of the course to one's current position, or if not one's current position, to a position potentially available at Amherst College. The reimbursement level (prorated for part-time employees) is up to \$3,000 per fiscal year for job related courses, 50% of tuition and fees up to \$1,500 per fiscal year for non-job related courses, and \$150 for a conference, seminar or workshop that must relate to one's current position. Please explain how this course/seminar relates to your current position, or to another position potentially available at the College.

Employee's Signature _____ Date _____

Please submit this form along with a copy of the course description(s) and cost breakdown to your Department Head for approval.

Department Head/Chairperson Approval

I support and approve this course application for the Educational Assistance Program. I believe the course:

Directly relates to the applicant's current job Does not directly relate to the applicant's current job.

Signature _____ Date _____

To Be Completed By the Office of Human Resources

This application is approved in the amount of \$ _____. Application Not Approved (see attachment for explanation)

Signature: _____ Date: _____

Important Educational Assistance Plan Information

Eligibility

Regular trustee appointed and staff employees, full-time or part-time (on a pro-rated basis) are eligible for Educational Assistance Plan benefits as follows:

- Job-Related Courses – After one year of continuous regular employment; the course must specifically enhance skills used in the employee's current position
- Non Job-Related Courses – After three years of continuous regular employment; the employee may take a course not directly related to the employee's current position, but the course must be related to potential future career opportunities at the College
- Conferences/Seminars/Workshops – No service requirement; the program must be relevant to the employee's current position

Payment/Reimbursement

For approved courses taken under the Educational Assistance Program, there are two means to receive payment, or reimbursement. You may receive an advance payment for 75% of the eligible course costs, subject to repayment if the course is not successfully completed, or receive reimbursement for a course after successful completion.

- Advance of Funds

Upon documentation of the eligible course costs, a check for 75% of the approved costs, made payable to the institution from which the course is taken will be provided to the employee. An Educational Assistance Repayment Agreement must be completed prior to receipt of the check.

- Reimbursement

Upon documentation of the successful completion of a course, the employee will receive a check for eligible course costs.

Course Completion Requirements

An employee must provide documentation of the successful completion of courses approved under the Educational Assistance Program. If a course is passed and an advance of funds was made, the Educational Assistance Repayment Agreement will be cancelled and considered paid-in-full. If no advance of funds was made the employee will receive a reimbursement for eligible course costs.

If a course is not successfully completed, the amount advanced by Amherst College to pay for the course must be repaid to the College, either through payroll deduction, or by a check. No future advance payments will be made until prior course payments for failed or uncompleted courses have been repaid.

An employee terminating employment prior to completion of a previously approved course for which an advance payment was provided, must repay the amount of advanced funds in accordance with the Educational Assistance Repayment Agreement.

Employees leaving the College within one year of receiving educational assistance must reimburse the College for its payments in accordance with the following schedule:

- Within one month of completion: ½ the amount
- Between one to twelve months: a proportional share of ½ the amount