

**Policy 1401**  
**Work-Related Education or Training from an External Source**

**Date of Current Revision: December 2024**

**Primary Responsible Officer: Director of Human Resources**

**1. PURPOSE**

In support of the university's commitment to professional development for all employees, this policy outlines the university's plan to reimburse employees who receive approved work-related education or training from an external source. Departments can pay for such course work in advance, or employee can be reimbursed after successful completion of the course.

**2. AUTHORITY**

The Board of Visitors has been authorized by the Commonwealth of Virginia to govern James Madison University. See Code of Virginia § 23.1-1600; § 23.1-1301. The board has delegated the authority to manage the university to the president.

**STATE OR FEDERAL STATUTE AND/OR REGULATION**

26 U.S.C. § 132(d)

26 U.S. Code § 127

**3. DEFINITIONS**

**Affiliate**

An individual who has a formal affiliation with the university, and receives some services from the university, but is not a student or employee of the university, and receives no remuneration from the university. (Formal affiliation means that a necessary relationship exists between the university and the individual to provide a service of value to the university.)

**External Source**

A source other than James Madison University.

**Work-Related Education and/or Training**

Education or training that is required by the university, law, or regulatory agency to keep present salary, status, or job; or training/education that maintains or improves skills required in the present job.

**4. APPLICABILITY**

This policy applies to all non-student employees in full-time, part-time, and wage positions.

## 5. POLICY

The university may authorize reimbursement to employees for the tuition of work-related education courses or work-related training programs taken at other institutions. Departments may also choose to pay for such courses or programs in advance.

### Guidelines and Limitations

The following eligibility guidelines and restrictions apply whether the employee seeks reimbursement or requests the department to pay for the course work in advance. The department must assure the following:

- a. Employee obtained prior approval before taking the class.
- b. The course work must meet the definition of work-related education (see Section 3 Definitions) and must be unavailable at James Madison University (see Policy [1402](#) – Tuition Waiver Program for Faculty and Staff Course Work Taken at James Madison University.)
- c. Short-term workshops, institutes, symposia, and other non-credit activities are not eligible for consideration under this policy. Refer to Policy [1403](#) - Training & Development A&P Faculty and Classified Staff.
- d. Reimbursement after the successful completion of course work, or advance payment by the department for course work, will be made for costs up to, but not exceeding, JMU in-state tuition and is contingent upon availability of department funds.
- e. Employees eligible to receive veteran's benefits for education will be eligible for tuition reimbursement for that portion of tuition not covered by the Veterans Bill.
- f. For employees seeking reimbursement, the employee must successfully complete the course to be reimbursed. When departments pay in advance for course work, employees who do not successfully complete the course must reimburse the department. See Policy [4502](#) – Debt Collection – Owed by Employees to the University.
- g. Termination of employment, for any reason, prior to the completion of the course work will make employees ineligible for any reimbursement.
- h. Educational reimbursement or advance payment by department will not be made for dissertation-related courses, such as the courses required for ABD (All But Dissertation) status.
- i. Educational reimbursement or advance payment by department will not be authorized for partial activity in, or for auditing, courses of instruction.
- j. Fees (application, readmission, laboratory, etc.), the cost of study materials, travel expenses, and meal expenses are not to be included in the amount requested for reimbursement or advance payment by the department.

- k. Course work meeting the IRS definition of work-related education will not be taxable, subject to IRS limits.
- l. Classroom and study requirements will not be regarded as a basis for compensatory leave.

## **6. PROCEDURES**

Employees seeking reimbursement or advance payment by the department for course work taken under this policy will follow these procedures.

- 6.1 The employee must prepare a [Request for Tuition/Registration Reimbursement or Advance Payment by Department form](#) and obtain authorization from the supervisor, department head/director, dean/AVP, and the appropriate vice president (or the appropriate designee) to participate.
- 6.2 The employee must arrange a schedule with their supervisor to make up missed time for course work taken during normal working hours.
- 6.3 The department budget authority will retain the Request for Tuition/Registration Reimbursement or Advance Payment by Department, and provide a copy to the employee.
- 6.4 Within 30 days of the successful completion of work-related education or training, employees must submit the following information to the department budget authority:
  - A copy of the approved Request for Tuition/Registration Reimbursement or Advance Payment by Department.
  - A copy of the grade report indicating successful completion of the course.
  - A copy of the receipt for payment of tuition.
- 6.5 When the employee is seeking reimbursement, the department budget authority will submit a Chrome River reimbursement request payable to the employee, attaching supporting documentation.
- 6.6 When the department is paying for course work in advance, the department budget authority will submit an accounting voucher payable to the institution providing the work-related education or training, along with the registration information, to Accounts Payable. If the institution accepts a small purchase charge card as a form of payment, the department must use this method.

## **7. RESPONSIBILITIES**

Supervisors are responsible for ensuring reimbursement or advance payment is for work-related education or training.

The responsibility of approving, denying, and paying for requests falls within the employee's department and is contingent upon availability of departmental funds.

Departments that pay in advance for course work are responsible for collecting the resulting

debt when an employee does not successfully complete a course. See policy [4502](#) – Debt Collection – Owed by Employees to the University.

Accounts Payable is responsible for processing advance payments or reimbursing employees in accordance with this policy.

All departments, offices, and employees that generate, receive, or maintain public records under the terms of this policy are also responsible for compliance with Policy [1109](#) - Records Management.

## **8. SANCTIONS**

Sanctions will be commensurate with the severity and frequency of the offense and may include termination of employment.

## **9. EXCLUSIONS**

Education programs undertaken for an employee to meet the minimum education requirements for their current position.

Dissertation-related courses, such as the courses required for ABD (All But Dissertation) status.

Short-term workshops, institutes, symposia, and other non-credit activities.

This policy does not apply to student employees, graduate assistants, or affiliates.

Educational opportunities covered in Policies [1402](#) and [1403](#) are excluded from this policy.

## **10. INTERPRETATION**

The authority to interpret this policy rests with the president and is generally delegated to the director of human resources.

**Previous version:** October 2021

**Approved by the president:** April 2016