

| | | | |
|------------------------|--|---------------------------|---------------------|
| Number: | 02.3.8 | Page: | 1 of 3 |
| Latest Version: | 1.0 | Revision Date: | 08/18/2015 |
| Effective Date: | 11/12/2015 | Replaces: | NEW |
| Revised By: | Fonda Logston | Review Cycle/Date: | Annual |
| Reviewed By: | Fonda Logston | Reviewing Unit: | Enterprise Programs |
| Title: | Education Assistance Reimbursement SOP | | |
| Description: | This document is the operating standard for applying for and receiving education assistance. | | |

Education Assistance Reimbursement Standard Operating Procedure

1. General Statement of Purpose
 - 1.1. The purpose of this document is to outline the process of an OMES IS employee applying for and receiving tuition reimbursement for qualified classes.
2. Scope
 - 2.1. This document applies to all OMES IS staff.
3. Discipline
 - 3.1. Administrative Standards
4. Instructions
 - 4.1. Eligibility
 - 4.1.1. Employees must meet the qualifications outlined in OMES Policy **HCM-10** (<https://www.ok.gov/OSF/documents/HRP&PEducationAssistanceProgram.pdf>) to receive reimbursement for educational expenses.
 - 4.2. Application Process
 - 4.2.1. If an employee meets the eligibility guidelines, they must fill out the **Education Assistance Application** (<http://www.ok.gov/OSF/documents/OMESFormHCMEducationAssistanceApplication.pdf>).
 - 4.2.2. The employee must then email their signed application and the following documentation to HCM at humanresources@omes.ok.gov:
 - 4.2.2.1. The application must be signed by the employee's Service Team Director on the "Supervisor Signature" line.
 - 4.2.2.2. A copy of their degree sheet or documentation of the classes' or certification's relevance to their job or job-related skills.
 - 4.2.2.3. A cover letter outlining the importance of the education to the employee for their current or future position.
 - 4.2.2.4. A copy of their current PMP.
 - 4.2.3. HCM will review the application to ensure the employee is eligible according to OMES Policy HCM-10.
 - 4.2.3.1. If the employee is not eligible, HCM will notify the employee of the reasons and return the application to the employee.

| | | | |
|------------------------|--|---------------------------|---------------------|
| Number: | 02.3.8 | Page: | 2 of 3 |
| Latest Version: | 1.0 | Revision Date: | 08/18/2015 |
| Effective Date: | 11/12/2015 | Replaces: | NEW |
| Revised By: | Fonda Logston | Review Cycle/Date: | Annual |
| Reviewed By: | Fonda Logston | Reviewing Unit: | Enterprise Programs |
| Title: | Education Assistance Reimbursement SOP | | |
| Description: | This document is the operating standard for applying for and receiving education assistance. | | |

- 4.2.4. HCM will then submit the application and all documentation to the Administrative Operations Committee to review the application on an annual basis according to a pre-defined schedule.
- 4.2.5. The Administrative Operations Committee review the applications annually. The schedule is as follows:
 - 4.2.5.1. Deadlines for Applications: March 1st for the next fiscal year funding
 - 4.2.5.2. Review Month: April
- 4.2.6. The application will either be approved or denied for the coursework listed on the application no later than April 30th.
 - 4.2.6.1. If the application is approved, the Enterprise Programs Support group will log the request and estimated costs of the courses and submit them to HCM for processing.
 - 4.2.6.2. If the application is not approved, HCM will notify the employee of the denial.
- 4.3. Reimbursement
 - 4.3.1. Once a tuition reimbursement eligible employee completes a course, they must fill out the Education Assistance Reimbursement Request (<http://www.ok.gov/OSF/documents/OMESFormHCMEducationAssistanceReimbursementRequest.pdf>), as outlined in OMES Policy HCM-10.
 - 4.3.2. After the request form has been completed, the employee must create a CRM Case and attach the form and all necessary documents to the case. The CRM Case will be assigned to the PMO provider group. The Enterprise Programs Support group will record the total cost of the courses, gather the COAO's signature and submit them to HCM for processing.
- 5. Roles and Responsibilities
 - 5.1. Employee
 - 5.1.1. Fills out the Education Assistance Application and submits it to HCM.
 - 5.1.2. Fills out the Education Assistance Reimbursement Request upon completion of a course.
 - 5.1.3. Provides proper documentation of courses, grades and payments.
 - 5.1.4. Creates a CRM Case to send all necessary reimbursement documents to the PMO provider group.
 - 5.2. Supervisor
 - 5.2.1. Provides employee's PMP and documentation of any formal, written discipline occurring within a year of their application.

| | | | |
|------------------------|--|---------------------------|---------------------|
| Number: | 02.3.8 | Page: | 3 of 3 |
| Latest Version: | 1.0 | Revision Date: | 08/18/2015 |
| Effective Date: | 11/12/2015 | Replaces: | NEW |
| Revised By: | Fonda Logston | Review Cycle/Date: | Annual |
| Reviewed By: | Fonda Logston | Reviewing Unit: | Enterprise Programs |
| Title: | Education Assistance Reimbursement SOP | | |
| Description: | This document is the operating standard for applying for and receiving education assistance. | | |

- 5.3. Service Team Director
 - 5.3.1. Approves/denies employee's applications of intent in Education Assistance.
- 5.4. HCM
 - 5.4.1. Determines the validity of all Education Assistance Applications within the confines of the OMES Policy HCM-10.
 - 5.4.2. Requests an agenda item be added to the Administrative Operations Committee in April of each year when applications are in need of review.
 - 5.4.3. Processes Education Assistance Applications and Education Assistance Reimbursement forms according to OMES Policy HCM-10.
- 5.5. Administrative Operations Committee
 - 5.5.1. Approves or denies Education Assistance Applications.
- 5.6. Enterprise Programs Support group
 - 5.6.1. Coordinates the signature of the COAO for reimbursement.
- 6. Limitation or Implementation Notes
 - 6.1. All tuition reimbursement must be in compliance with OMES Policy HCM-10.
- 7. References
 - 7.1. OMES Policy HCM-10
<https://www.ok.gov/OSF/documents/HRP&PEducationAssistanceProgram.pdf>
 - 7.2. Education Assistance Application
<http://www.ok.gov/OSF/documents/OMESFormHCMEducationAssistanceApplication.pdf>
 - 7.3. Education Assistance Reimbursement Request
<http://www.ok.gov/OSF/documents/OMESFormHCMEducationAssistanceReimbursementRequest.pdf>