



## Education Plan

An Education Plan must be completed prior to registering for any courses.

### Steps for Approval

Complete the Education Plan form completely. Forms requiring additional information will be returned to you and may result in delays.

Obtain your supervisor's approval as well as that of the MMS Talent Manager.

**Note to supervisors, managers, and Site Leaders:** Approval of tuition reimbursement requests must follow the guidelines listed below:

- Education program must have relevance to the MMS mission
- There is a mutual benefit to the employee's career and the long-term interests of MMS.
- There is a reasonable expectation that the employee shall remain in the employ of the MMS for a sufficient period of time to provide a fair return for the training costs.
- The proposed curriculum and timetable are realistic
- The employee will have sufficient time to complete the course work and attend classes.

Send the completed and signed form to the Talent Manager for approval. Form should be submitted **before you register for any course (programs)** in order to be qualified for tuition reimbursement.

If you cannot enroll in a class after approval has been granted, inform the Talent Manager and your supervisor as soon as possible explaining the reason for not enrolling (e.g., class full, class not offered this quarter/semester) and provide the relevant information for any substituted class.

To receive reimbursement for tuition, complete the Tuition Reimbursement Request form and submit this to the Talent Manager within 45 days of completion of the course. Include a copy of your grades (transcript, report card, certificate of completion, etc.) and itemized receipt(s). Reimbursement will be sent to you for courses in which you received a satisfactory grade (Full tuition reimbursement is paid on courses completed with a minimum of a "C").

***If you did not receive a satisfactory grade for any course, the cost of the units or a prorated amount of the tuition will not be reimbursed.***



# EDUCATION PLAN

Employee Information	
Employee Name	Job Title
Employee ID	Supervisor Name
MMS Start Date:	Department

Educational Program Details			
Program Type	<input type="checkbox"/> Degree	<input type="checkbox"/> Certificate	<input type="checkbox"/> Coursework Only
Program Start Date		Expected End Date	
Institution (Provider) Name			
Class Time (check the appropriate box)			
<input type="checkbox"/> Course times can be accommodated outside my normal working hours			
<input type="checkbox"/> Course times will be accommodated by an adjusted work schedule			

COURSE #	COURSE TITLE	Days (MWF, TuTh, Self-paced, online)	Course Fee	Books / Supplies / Lab Fees
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$

Business Case: Explain how this education plan supports your current role or career objectives

## ACKNOWLEDGEMENT

### IT IS MY UNDERSTANDING THAT:

Reimbursement will be limited tuition, books, course-required materials, and lab fees with a maximum reimbursement of \$3000 per 12-month period.

Reimbursement will be made only upon the presentation of evidence of satisfactory completion of the course(s) (Grade of "C" or better for an undergraduate course; a grade of "B" or better for a graduate level course; and a "Pass" for a "pass/fail" course) and paid (itemized) receipts for tuition, books, materials, and lab fees.

Grade report and original paid receipts must be presented to MMS together with a completed Tuition Reimbursement Program Payment Authorization form no later than thirty (45) days following course completion.

To be eligible for reimbursement, I must remain on the payroll as a regular full-time or part-time employee for one (1) year after course/program completion or I agree to repay 100% of the tuition expenses provided to me during the previous twelve (12) months. I authorize MMS to withhold any remaining amount from my pay(s) as required.

I am solely responsible for payment of taxes as a result of any reimbursement for education that may be found to be taxable.

MMS's tax withholding policy and any decision to withhold or not withhold taxes from educational reimbursements to me do not constitute tax advice and I agree to hold MMS harmless from any claim associated with MMS's withholding of payroll taxes.

I FURTHER UNDERSTAND THAT participation in the Tuition Reimbursement Program is not an employee right and although MMS expects to continue this program in the future, my participation in the program may be curtailed or discontinued at any time as a result of budgetary limitations, my work record at the time of enrollment, or other related factors. Curtailment of the program will not affect payment for a course that has been previously approved.

**Employee Signature**

**Date: MM/DD/YYYY**

## APPROVALS

**Supervisor Signature**

**Date: MM/DD/YYYY**

**Talent Manager Signature**

**Date: MM/DD/YYYY**