



San Joaquin County Educational Reimbursement Program Application Instructions

The Educational Reimbursement Application must be received by Human Resources (HR)-Staff Development prior to class or no later than 10 business days after the first day of class. The application must be filled out completely and include supporting documents. Incomplete applications may be returned which will delay payment, or may be denied. See instructions below.

1. Fill in *all* information on the application (EID, MOU, education goals, dates, etc.) If there has been a recent change of address, please notate this on the application.
2. Sign the application and send it to your Department Appointing Authority or Designee for approval *before* submitting it to HR-Staff Development.
3. Include *all* required supporting documents with your application (see below).

Required Documents for a Degree Program

- Degree program graduation requirements – what classes are needed to complete your program
- Class schedule – including beginning & end class dates (not the entire program)
- Fee schedule – The costs of the course or courses

Required Documents for Individual Courses, Certificate Programs or License Renewal

- Documentation that provides course title and description, training date(s), and the fee schedule

Note: If requesting books, please also submit class syllabus and book receipt

For Attorneys who are requesting reimbursement of books only

Submit application and payment verifications **no later than 60 calendar days** after the date the book was purchased

HR-Staff Development will review the application and notify the employee of the application status (accepted, denied, or in review) within ten (10) business days of receipt of the application.

4. Applications that are not received within the above deadline will be denied. As such, employees are *strongly* encouraged to submit their application to HR-Staff Development as early as possible to allow sufficient time to meet the deadline.
5. Contact HR-Staff Development immediately if there are changes to your application (e.g. change of address, dropped or added classes, etc.) once it has been submitted.
6. Once the course is completed, submit additional required documentation (see below) to HR-Staff Development **no later than 60 calendar days** after the class ends.
 - A copy of all payment receipts including registration and fees. (Receipt[s] must clearly identify the purchased items and the amount paid for each purchased item.)
 - A course syllabus listing the required textbooks if application requests reimbursement for textbooks
 - Proof of satisfactory completion of course (i.e. certificate or grade report of C or better)

Reasons for denial of education reimbursement:

- Application and all required documents were not received by HR-Staff Development on time
- Employee reached maximum allowable amount for the semester or fiscal year
- Employee received "Unsatisfactory" rating on last performance evaluation
- Employee is on Leave of Absence
- Class/Training is not eligible for reimbursement