



DEPARTMENT OF ADMINISTRATIVE SERVICES
INTERNAL POLICIES AND PROCEDURES

F220A Education Assistance Agreement

Instructions

Prior to Course(s): This is an agreement between you and your division. Approval for Education Assistance is required prior to enrolling in the course of program for which reimbursement is sought. Provide, to the best of your ability, the information and costs associated with the course(s) you intend on taking to minimize delayed approval.

Upon Completion: Attach the following as appendixes to this form:

1. A completed and signed form FI 48 AR, which is provided by the Division of Finance, with all necessary signatures and calculated reimbursement amounts;
2. An official receipt showing that you paid the tuition and other fees directly associated with and required by the course; and
3. An official record or transcript of grades showing that you successfully completed the course.

If the amount calculated on the original agreement is less than the receipts show, you will need to amend the original agreement by adding an additional appendix stating such, or submit an amended version of this form. If the amount calculated on the agreement is more than the actual costs confirmed by the receipts, the amount reimbursed will be the lesser amount from the receipts.

The reimbursement amounts must be the same on your agreement and the FI 48 AR. Please ask for assistance if you have questions about filling out the FI 48 AR. Due to IRS regulation, any Education Assistance paid in excess of \$5,250 is considered taxable income, and will therefore use a different wage type and object code.

	Wage Type	Object Code
<i>Non-Taxable</i> (\leq \$5,250)	1154	6282
<i>Taxable</i> ($>$ \$5,250)	1123	6273

Ensure that you attach official receipts with your agreement rather than a summary of tuitions and fees. Receipts not indicating that the charges were paid for by you will not be accepted, which may result in the delay of your reimbursement.

Submit the completed agreement to the Executive Director's Office. To reduce paper waste, please submit this form electronically where possible. You need not submit this first instruction page with the agreement nor a cover page or memorandum.

Your reimbursement will be included with you regular payroll, and will typically not be on the following pay date, but the one thereafter.

*Any Education Assistant Agreements with exceptions from the DAS Policy 220, *Education Assistance* must include an appendix explaining said exception with approving signatures from the Division Director and the Executive Director or his/her designee.



F220A Education Assistance Agreement

Applicant Information

1 First name	2 Last name	3 Employee Identification Number (EIN)					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Work address (street and number or P.O. box)					5 City and ZIP Code		
<input type="text"/>					<input type="text"/>		
6 Division				7 E-mail address			
<input type="text"/>				<input type="text"/>			

Course & Reimbursement Amounts

8 Detailed list of courses OR degrees for this agreement	9 Percent
<input type="text"/>	<input type="text"/> %
	10 Total cost
	<input type="text"/> \$
11 Calculate percentage (9) from the total cost (10) and insert the result here. This is your total reimbursement, and should match on the FI 48 AR. ▶	<input type="text"/> \$

Acknowledgements

Enter your initials in each box to confirm that you have read and understood the following provisions from DAS Policy 220, *Education Assistance*.

13 If you voluntarily terminate your employment within 24 months of accepting reimbursement for educational assistance, you will be required to reimburse the state the amount that you received in the last 24 months.	<input type="text"/>
14 The IRS allows for non-taxable reimbursement of up to \$5,250 for education assistance. If you exceed this amount in one year, the amount in excess of \$5,250 is considered taxable income, and taxes may be withheld from reimbursements.	<input type="text"/>
15 There is no given or implied guarantee of a position advancement or salary increase for completion of all or part of an educational curriculum.	<input type="text"/>

Sign Here ▶

16a Your signature	16b Date
<input type="text"/>	<input type="text"/>
17a Division Director signature	17b Date
<input type="text"/>	<input type="text"/>
18a Executive Director signature (or designee)	18b Date
<input type="text"/>	<input type="text"/>