



Lawrence Berkeley
National Laboratory



EMPLOYEE Tuition Assistance Program Handbook

At the Ernest Orlando Lawrence Berkeley National Laboratory (LBNL), we are committed to developing our people to their fullest potential.

Through the Tuition Assistance Program, the Berkeley Lab encourages and financially assists career employees in obtaining skills, knowledge, and abilities that increase the effectiveness of work performance in their present position and improve their career opportunities within the Laboratory.

With supervisor approval, career employees who have passed probation and are working 50% time or more are eligible to receive reimbursement for tuition expense for position-related or career-related college courses that are relevant to the goals of the Laboratory. For employees pursuing **degrees or specialty certificates (Tier 1)** reimbursement is 100%. For employees taking career-related college **courses not leading to a degree (Tier 2)** reimbursement is two-thirds. Participation in the program is an important privilege that can lead to greater job satisfaction, enhanced performance, and expanded career possibilities.

Tier 1: The employee receives 100% reimbursement for courses completed satisfactorily under an Employee Development Plan leading to a degree or specialty certificate. The degree or specialty certificate can be either position- or career-related. The courses must be offered by an accredited college or university or a recognized professional society. CEU courses are reimbursable when they are a part of a Tier 1 approved Employee Development Plan.

Tier 2: The employee receives two-thirds reimbursement for college-level courses not leading to an academic degree or specialty certificate. Courses must be offered by an accredited college or university. CEU courses may be reimbursed when offered by a university or college continuing education program.

Specific questions and answers are discussed below.

For additional policy information see [RPM 2.04 F](#).

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◆ Eligibility

Who is eligible for tuition assistance?

Career employees who have passed probation and are working 50% time or greater are eligible to take college-level courses for job-related or career-related purposes, including study for a degree.

Who pays for the tuition reimbursement?

Laboratory overhead pays 100% of allowable fees for approved courses of study for a degree or specialty certificate (Tier 1). The Laboratory pays two-thirds and the employee pays one-third of allowable fees for career-related college-level courses not leading to a degree (Tier 2).

What if a course is required for my job?

If an employee is **required** by the Laboratory to take a college level course, it is considered off-site training. The employee's Division/Department pays all relevant costs for the course, including books and travel expenses, regardless of the employee's final grade. The employee's time in the class, including travel, is considered time worked and does not count towards the six hours per week educational leave time for which the employee might otherwise be eligible. For more information about educational leave time, see "Supervisor's Responsibilities" in authorizing time off for class, described below.

◆ Employee's Responsibilities

What are the employee's responsibilities?

The employee must:

- Discuss job and/or career related goals with supervisor.
- Develop an [Employee Development Plan \(EDP\)](#) if the job or career goals include studying for a degree or specialty certificate, or if the employee will take more than three college-level courses in a year. If the goal is a career that would transfer the employee from his/her current division, he/she will need the concurrence of the department head or division director of the new division on the [Employee Development Plan](#).
- Identify desired course(s) and institution to study.
- After obtaining prior approval from his/her supervisor and the Division Director or designee, submit a [Tuition Assistance Request Form – Part I: Enrolling in Courses](#) online to the **Tuition Assistance Program Coordinator** in the Human Resources Department.
- Remain in career status during the entire quarter or semester.
- Submit grades and receipt(s) within 45 days of completion of courses.
- Make satisfactory progress towards the degree or specialty certificate.

Is an Employee Development Plan also required?

An [Employee Development Plan](#) is required for Tier 1 and when the employee is taking more than three college level courses in a year under Tier 2. If Employee Development Plan is more than \$25,000, additional approval from Human Resources Center Manager (or designee) is required. Allow up to four weeks for approval process.

Are certain grades required?

When an "A-F" grading system is used, a grade of "C" or better for undergraduate work, and a passing grade or better for graduate work, as defined by the University, graduate program is required for reimbursement. If there is a choice between receiving a letter grade or a "Pass/Fail" evaluation, the employee must take the letter grade.

◆ [Supervisor's Responsibilities](#)

What are the supervisor's responsibilities?

Supervisors, upon an employee's request, are encouraged to assist the employee in setting career goals which are consistent with the employee's current assistance in the development of skills and knowledge that prepare the employee for additional assignments or other positions within the Laboratory. Whether participation in the program is position-related or career-related, supervisors should review tuition assistance requests either for relatedness to the employee's Laboratory work assignment or to career-related goals described in an approved formal [Employee Development Plan](#). Supervisor approval of Employee Development Plans and requests for reimbursement must be based on the following:

- Relevance to the Laboratory's mission.
- Must be of mutual benefit to the employee's career and the long-term interests of the Laboratory.
- There is a reasonable expectation that the employee shall remain employed at the Laboratory for a sufficient period of time to provide a fair return for the training costs.
- The proposed curriculum and timetable are realistic.
- The department/division's work needs can be met during any employee absences due to attending class.
- Must have satisfactory performance ratings.

An employee who is denied approval of an Employee Development Plan may request a review of the denial by the Chief Human Resources Office, pursuant to [RPM 2.04](#).

Is supervisor approval necessary?

Yes. The employee's course of study, as listed in the EDP, must also be approved by the employee's Division Director or Department Head and by the **Tuition Assistance Program Coordinator** of the Human Resources Department.

Can time off for class be authorized?

Time off with pay may be granted to employees when their absence will not adversely affect progress of work *and*:

- The employee remains at least 50% time in career status during the entire quarter or semester.
- The course(s) are submitted for approval before registration each academic quarter or semester.
- The course(s) cannot reasonably be taken outside the employee's scheduled working hours.
- The course(s) are not taken over the internet.
- Time off with pay does not exceed six hours per week including time for travel and registration. Time off with pay is charged to the employee's division overhead account. Additional time required must be accounted for by an adjusted work schedule or use of vacation credit.

◆ **Human Resources Center Manager's Responsibilities**

What are the Human Resources Center Manager's Responsibilities?

The Human Resources Center Manager reviews EDPs for employees who request \$25,000 or more for their programs. Approval is based on:

- The employee's good standing in the division.
- Relevance to the Laboratory's mission.
- Mutual benefit to the employee's employment.
- Employee's past performance and potential.
- A reasonable expectation that the employee will remain employed at the Laboratory.
- The proposed curriculum and timetable for completion are realistic.
- The department/division's work needs can be met during any employee absences due to attending class or other absences related to his/her program.

◆ Tuition Assistance Program Coordinator's Responsibilities

What are the Tuition Assistance Program Coordinator's Responsibilities?

- Review EDPs and course data for approval.
- Process data submitted through Tuition Assistance Request Forms (Part I and II).
- Forward payment information to payroll for processing.
- Contact program participants for clarification or missing information within 3 to 5 days of submission.
- Answer questions or concerns of Laboratory employees.
- Follow up with participants and their supervisors if advance has not been cleared within 35 days.
- Send information to payroll for collections if a participant's advance has not been cleared within 45 days.
- Collect repayment for courses that have been dropped or failed.
- Check status of payment with payroll at participant's request.

◆ FAQ on the Program

What kinds of expenses does the Laboratory pay?

The Laboratory reimburses course costs, including tuition, course fees, and lab fees. All other expenses such as books, entrance application fees, late fees, parking, medical and student ID fees are paid by the employee.

Does my division pay for the cost of tuition assistance?

No, the cost is charged to Laboratory overhead. If time off for work is approved, the employee's time is charged to their regular pay account.

Can I attend any institution I choose?

Yes, as long as the institution is an accredited college or university.

Are there taxes on my tuition reimbursements?

When education assistance for courses exceeds a maximum of \$5,250.00 per year, the employee's tuition assistance is subject to withholding of taxes:

- If the education is required in order for the employee to meet the minimum educational requirements of his/her present position.
- If the education is part of a program that will qualify the employee for a new job at the Laboratory (e.g. promotion or transfer to a different type of work).

The employee's tuition assistance is not subject to withholding of taxes:

- If the education is required by LBNL or by law to keep the employee's current salary or job and/or the education maintains or improves skills needed in the current job.

Will the Laboratory reimburse non-resident tuition?

No.

What will happen if I withdraw from the course before completion and my fees cannot be returned?

If your Department Head or Division Director confirms that you were required to withdraw because of a work assignment your course fees will be reimbursed. If you withdraw for personal reasons, the Laboratory will not reimburse your fees.

Can I receive this laboratory assistance in addition to other support such as a scholarship?

Yes, but only to the extent that the other financial aid does not cover reimbursable fees under the Berkeley Lab program. If you are receiving a scholarship, discount, or other financial aid, you must provide documentation of the amount and how it is applied to your fees. The Laboratory will only pay for the amount of tuition, less the scholarship.

What if I can't afford to pay the required fees at the beginning of the semester/quarter?

The Laboratory has established an Advance on Tuition program whereby you may be granted an advance on the reimbursable fees. The minimum advance is \$250.00. If you wish to take advantage of this program, you will need to indicate on the [Tuition Assistance Request Form – Part I: Enrolling in Courses](#) online. You should submit this form at least four weeks in advance to allow time for processing the advance check. Should you not receive a qualifying grade for a course, you will be required to repay the advance.

Can I receive more than one advance at a time?

The Tuition Assistance Program cannot process more than one advance at a time for each participant; you cannot receive another advance until your grades and receipt for your prior advance are submitted. Please take this into consideration when scheduling your courses and planning your finances, as some programs have no breaks in between terms. If this is the case, please prepare to pay your tuition upfront until you clear your prior advance.

I'm going on medical leave. Can I still participate in the program?

Contact the TAP coordinator for eligibility while you are on medical leave.

◆ **[More questions?](#)**

Ask your HR Center representative or call Warren Moore, Tuition Assistance Program Coordinator, at extension 7943 and email TAP@lbl.gov.

Ernest Orlando Lawrence Berkeley National Laboratory
Employee Tuition Assistance Program
Fostering excellence through continued education development.