

# Memorandum



**Date:** November 12, 2013

**To:** All Tuition Reimbursement Participants

**From:** Rhonda Hogan-Brock, AVP, HR Training and Professional Development

A handwritten signature in blue ink, appearing to read "RHB", enclosed in a blue circular scribble.

**Re:** **Educational Expense Reimbursement Application and Refund Requisition Form – Updated Information**

There have been some recent changes to NYC Transit's Educational Expense Reimbursement Program (Tuition Reimbursement). The attached form HR-TRN-003 from the Business Service Center (BSC) was revised on June 5, 2013 and is accessible from the BSC employee portal <http://www.mtabsc.info> or from the HR Training and Professional Development website on *mta today*.

Please ensure that after obtaining the fully approved required signatures, all original completed forms are submitted as follows: **Sonia Clark, Educational Expense Reimbursement Program Coordinator, 180 Livingston Street, Rm. 636C, Brooklyn, NY 11201**. The information should be sent within sixty (60) days of the class(es) official start date, for final disposition. If personal delivery of the completed application package is preferred, a designated drop box is located on the 6<sup>th</sup> floor at 180 Livingston Street. The application package will then be forwarded to the BSC for processing.

Requests for changes to submitted applications and notification of course cancellations should be sent directly to the BSC Customer Management Center. Grades and receipts must also be sent to the BSC for reimbursement at the end of course completion.

Employees can contact the BSC Customer Management Center to request assistance at (646) 376-0123 weekdays from 8:30 am to 5:00 pm, or anytime via e-mail at [bscservice@mtabsc.org](mailto:bscservice@mtabsc.org). The center is located on the 9<sup>th</sup> Floor at 333 West 34 Street in Manhattan.

If you have any questions regarding this matter, please contact Sonia Clark at (347) 643-8469 or [sonia.clark@nyct.com](mailto:sonia.clark@nyct.com).

Attachment

cc: Department/Division Heads  
Training Liaisons  
D. Pinnock  
T. Parker  
S. Clark

# Educational Expense Reimbursement Application and Refund Requisition Form



HR-TRN-003  
MTABSCDMPRD000374

## Section 1 - Information and Instructions

The purpose of this form is to apply for tuition reimbursement for an upcoming course. Please read the instructions carefully to complete the form and determine eligibility to apply. If you have already completed a course without going through the tuition reimbursement process, you may not be eligible to apply for tuition reimbursement from the MTA.

**Please comply with the following guidelines governing the reimbursement program. Also note that your agency may have specific policies that you must follow.**

- 1) Read the MTA All-Agency Educational Expense Reimbursement Policy, including eligibility criteria, reimbursement conditions and exclusions. See the MTA HQ and agency intranet sites or contact your agency HR Dept. or Agency Educational Expense Reimbursement Program Administrator.
- 2) Complete the first page of this form. Use blank paper to provide additional information, as necessary.
- 3) Obtain signature approvals from your immediate Supervisor, Division Head (where applicable), and Department Head. Applications will not be accepted or reviewed once the course is in session, no exceptions (Note: NYCT employees have 60 days after the course start date). A copy of the description(s) of course(s), tuition and itemized fees related to the request must accompany the application. NOTE: This does not guarantee that all eligibility requirements have been met or that reimbursement funds are available.
- 4) Completed applications must be submitted to the appropriate agency Educational Expense Reimbursement Program Administrator for approval. The Program Administrator will forward the completed application to the BSC for processing.
- 5) Upon successful completion of the course, submit an official transcript of grades and an itemized cost breakdown of incurred expenses for reimbursement to the BSC. You can scan the documents and email them to [bscservice@mtabsc.org](mailto:bscservice@mtabsc.org); fax to 212-852-8700, or mail to MTA Business Service Center, 333 W. 34<sup>th</sup> Street, New York, NY 10001

If you have any questions, please contact the BSC at 646-376-0123 or [bscservice@mtabsc.org](mailto:bscservice@mtabsc.org).

## Section 2 - Employee Information

Print Name		Last					First		M.I.	Suffix	BSC ID
Agency (check one)	<input type="checkbox"/> BSC	<input type="checkbox"/> B&T	<input type="checkbox"/> CC	<input type="checkbox"/> HQ	<input type="checkbox"/> Police	<input type="checkbox"/> NYCT		Department			
	<input type="checkbox"/> SIR	<input type="checkbox"/> LIRR	<input type="checkbox"/> MNR	<input type="checkbox"/> MTA Bus	<input type="checkbox"/> MaBSTOA						
Street Address											
City				State				Zip Code			
Phone (H)			Phone (W)				Email				
Position Title			Work Hours				Work Days				
<input type="checkbox"/> Represented		<input type="checkbox"/> Non-Represented		Date of Hire							

## Section 3 - Program Information

Relationship of Course(s)/Program to Current/Potential (circle one) MTA Responsibilities:

Are you eligible for or are you receiving tuition assistance from any other source(s)?  Yes  No (If YES, provide details below)

Source	Amount \$	Source	Amount \$
College or University		Institution's Website	
Type of Program: Graduate <input type="checkbox"/> Undergraduate <input type="checkbox"/> Certification/Certificate <input type="checkbox"/> Exam <input type="checkbox"/>		Credits Required	Credits to Date
Field of Study/Major or list Certification			
Date Course(s) Start		Date Course(s) End	Anticipated Date of Graduation

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HR-TRN-003

Section 4 - Course Information							
Course Title	Course No.	No. of Credits	Day(s) Class Meet	Hours		Tuition	Agency Charge-Back Dept Code
				From	To		
						\$	
						\$	
						\$	
						\$	
Total Credits at \$ Per Credit						\$	
Registration Fee						\$	
Other Fees (List)						\$	
Total						\$	
Less Assistance From Other Sources						\$	
Reimbursement Requested						\$	

Section 5 - Authorization
<p><i>Except as reported above, I have not received, nor am I eligible to receive any outside financial aid which is contingent upon attendance at an educational institution such as scholarships, fellowships, veteran's benefits, etc. I recognize that should such aid (applicable to periods for which I have accepted MTA Agency Educational Expenses) be received, I would be obligated to report such aid to the MTA Agency and repay an equivalent amount (up to the value of the applicable Educational Expense). I understand that if the above course(s) is approved under the guidance of the Educational Expense Program, payment will initially be made at my personal expense. I understand that I will be entitled to reimbursement for applicable tuition and fees upon the submission of an itemized cost breakdown, proof of satisfactory completion and paid receipt, which must be submitted and attached to the application within six months of course completion. I permit the release of documents to the MTA Agency from relevant institutions to verify the accuracy of documents I submitted. I understand that participation in this program will not automatically make me a candidate for promotion; nor will approval for participation imply consideration for promotion or other preferential treatment. Educational Expense is offered at the discretion of the MTA Agency, which has the absolute right to modify or discontinue this Program in whole or in part.</i></p> <p><b>I HAVE READ THE EDUCATIONAL EXPENSE REIMBURSEMENT POLICY (AVAILABLE ON THE AGENCY INTRANET OR THROUGH THE PROGRAM ADMINISTRATOR) AND I AGREE TO ALL TERMS AND CONDITIONS.</b></p> <p>Employee Signature _____ Date _____</p>

Section 6 - Checklist for Applicants
<p>Listed below is a description of the documents that are required to process your request for Educational Expense Reimbursement approval. As indicated in the MTA Educational Expense Reimbursement Policy, you must obtain signatures from both your department and from the Educational Expense Reimbursement Program Administrator. The employee assumes all financial obligations related to the program or course(s) unless and until the approval is granted. Employees are encouraged to seek approval prior to registration for the program or course(s).</p> <p><b>Please check off the following requirements when they have been submitted for approval:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Complete application</li> <li><input type="checkbox"/> Completion of a minimum of six months of continuous satisfactory service/more than six months of continuous service per your Agency Policy/Procedure or completion of one year/ probationary period for union employees, per your agency policy.</li> <li><input type="checkbox"/> Degree Program Acceptance Letter (if applicable)</li> <li><input type="checkbox"/> School course description, tuition and other fee breakdown</li> <li><input type="checkbox"/> Statement of Accreditation</li> <li><input type="checkbox"/> Coursework is related to current or potential job responsibilities within the MTA Constituent Agencies, and the relationship has been explained on the application</li> <li><input type="checkbox"/> Application is submitted, per your agency policy, prior to the class(es) official start date.</li> </ul> <p>If requirements have been verified as having been met and required documents are attached, please forward application to your immediate supervisor for review and recommendation for processing.</p>

# Educational Expense Reimbursement Application and Refund Requisition Form



HR-TRN-003

## Section 7 - Review, Recommend, and Approve for Participation

NOTE: Departmental recommendation addresses only whether the employee requesting educational expense reimbursement is in good standing in terms of attendance and performance, and whether the coursework will interfere with the proper and effective discharge of the employee's duties or otherwise render the employee unfit for duty. The Educational Expense Reimbursement Program Administrator's approval addresses: the employee's eligibility with regard to length of service; timely submission of application; eligibility of institutions/courses/fees; course appropriateness; assistance from other sources; available balance in employee's annual allotment; and availability of Program funds. (Employees of subdivisions or field offices must obtain necessary approvals before forwarding to Division Head.)

### SIGNATURES

**Immediate Supervisor** **Recommend**  Yes  No

Title

Name (Print)

Signature

Date

**Division Head (if applicable)** **Recommend**  Yes  No

Title

Name (Print)

Signature

Date

**Department Head** **Recommend**  Yes  No

Title

Name (Print)

Signature

Date

**Department Head** **Recommend**  Yes  No

Title

Name (Print)

Signature

Date

**Educational Expense Reimbursement Program Administrator** **Approve**  Yes  No

Name(Print)

Signature

Date

Previous reimbursement this calendar year \$ \_\_\_\_\_

Reimbursement approved on this application \$ \_\_\_\_\_

Total reimbursement this calendar year \$ \_\_\_\_\_

## Section 8 - Employee Request for Reimbursement Upon Completion of Coursework

When requesting reimbursement for course(s), please ensure that the following necessary items are enclosed:

- 1) Proof of Payment such as credit card receipt, bursar's receipt.
- 2) An itemized breakdown of costs including tuition and all fees incurred.  
Note: LIRR accepts an itemized bill for the semester if tuition deferment is offered by the institution. A paid receipt must be submitted within two weeks of receiving reimbursement.
- 3) Verification of Satisfactory Grade.
  - a. Original Transcript\* or Original Grade Report\* indicating a grade C- or better for undergraduate courses, a grade B- or better for graduate courses, or a grade of "Pass" in a Pass/Fail course;
  - b. For license, certificate, or home study courses, evidence of successful completion of certification.

\*Costs related to obtaining the Original Transcript or Original Grade Report are not reimbursable.

NOTE: Per your agency policy, if the person is not active with the MTA at the time of the reimbursement request, he/she will no longer be eligible for reimbursement and may be required to refund the agency.