Training Reimbursement Guidelines

SLAC employees are encouraged to continue their education either through classes that will improve their current job performance, or degree programs that will prepare them for advancement.

There are three types of training funds.

- **Staff Training Assistance Program (STAP) Funds (from Stanford University)**
  
  Used for seminars, conferences, workshops and training

- **Stanford Tuition Reimbursement Program (STRP)**
  
  Used for degree programs, and paid directly to the institution by Stanford University. Must be used first if a degree program is undertaken. No STAP funds may be used with this program.

- **SLAC 90% Tuition Reimbursement Program**
  
  Used for certificate and degree programs after STRP funds have been exhausted, paid by SLAC directly to the employee. Can be used in conjunction with STAP funds.
Training Reimbursement Guidelines

Staff Training Assistance Program (STAP)

Each employee has STAP funds ($800/year) available to offset training expenses. These funds can be used alone, in conjunction with a department charge number, or with the SLAC 90% Tuition Reimbursement Program to pay for class fees, required texts, and taxes.

All STAP fund requests require an approved SLAC Registration Payment form.

- Request for Reimbursement to employee or Check to a Vendor using STAP funds and/or department charges must include:

  1. SLAC Registration Payment Form (available online at http://www.slac.stanford.edu/cgi-wrap/regpay.cgi) signed by the appropriate department head (with a Charge Number noted in that field in case STAP funds have been exhausted). This form is required in order to let Accounting know how to make the payment.

  2. Approved STAP form (available online at http://www.slac.stanford.edu/cgi-wrap/stafftrn.cgi) signed by the employee, his/her supervisor, and/or the group leader/department head (as appropriate), with the correct box checked in FUND USE.

  3. Original or copy of registration confirmation from the institution for enrollment in the class, and original receipts for all expenses (if no original receipt, the employee must fill out a Lost Receipts form). If paid by the employee’s personal credit card, either the credit card purchase slip or a verified copy of the original credit card statement is required.

  4. Backup documentation including class description/program agenda and cost.

STAP funds will pay for class fees, required texts, and taxes up to $800/year. (If the expense totals over the allowed amount, either a department charge number is required, or the employee is not reimbursed for the full amount; i.e., if “Use STAP Funds Only” appears under FUND USE, the employee is not reimbursed for the amount above STAP funds will cover.)

Technical Division (TD) requests for STAP funds with expenses over a total of $500 MUST be approved by the Technical Planning Office (Bldg. 041, Room 225), before they are submitted to the Training Office for processing.

The Training Office fills out “STAP” section of the form and submits the entire package to the Budget Office for processing.
Training Reimbursement Guidelines

- Request for use of STAP Funds when Registration Charged to SLAC Purchase Card:

  (NOTE: This process applies only to SLAC Purchase card. If the employee uses a personal credit card, follow the procedure for “Reimbursement to Employee.”)

  1. Approved STAP form (available online at http://www.slac.stanford.edu/cgi-wrap/stafftrn.cgi) signed by the employee, his/her supervisor, and/or the group leader/department head (as appropriate), with the correct box checked under FUNDS USE. “Paid by SLAC Credit Card” should be checked, and the cardholder’s name should be noted.

  2. Original or copy of registration confirmation from the institution for enrollment in the class.

  3. Backup documentation including class description/program agenda and cost.

A combination of STAP funds and department charge number will pay for class fees, required texts, and taxes. Note: Taxes may not be paid with DOE funds.

Technical Division (TD) requests for STAP funds with expenses over a total of $500 MUST be approved by the Technical Planning Office (Bldg. 041, Room 225), before they are submitted to the Training Office for processing.

The Training Office fills out “STAP” section of form and returns a copy and all backup to the requestor with a memo noting the requestor’s action required when the credit card statement is returned to Accounting.
Training Reimbursement Guidelines

Stanford Tuition Reimbursement Program (STRP)

Eligibility:

- Employee must be a continuing regular staff member (working a minimum of 50% and not in a fixed-term position).
- STRP assistance is pro-rated for regular staff working less than full-time.
- Staff receiving financial assistance from other sources that would DUPLICATE assistance (i.e., scholarships, grants, departmental funds) are not eligible for STRP.

Service Requirement: The staff member must have completed one year in an ongoing regular position.

Benefit Amount per year: The maximum STRP reimbursement is $2000 per fiscal year, pro-rated for regular staff who work less than full-time. Unused STRP funds may not be “carried over” to future years. These funds must be exhausted before any other tuition reimbursement funds may be used (i.e., Staff Training Assistance Program [STAP] or SLAC 90% Tuition Reimbursement Program).

Allowable Expenses: STRP assistance is allowable for undergraduate or graduate education leading to a degree. The employee must be admitted to a degree program. The allowance is limited to regular tuition and general recurring fees only. No Stanford Training Assistance Program (STAP) funds are used in conjunction with this program.

Fees and materials that STRP will not reimburse include:
- Books or course materials
- Certificate programs
- Room and board
- Courses taken through correspondence
- Laboratory breakage fees
- Tutoring fees
- Auditing fees
- Special fees for specific courses
- Late fees
- Transportation and parking
- Expenses at any United States institution that are not normally included in the basic tuition fees by Stanford University, the University of California, or the California State Universities.

Eligible Institutions: Payments under STRP will be made to accredited United States Colleges and universities listed in the current edition of “Accredited Institutions of Postsecondary Education” published by the American Council on Education.
Training Reimbursement Guidelines

**Supervisory Approvals:** Supervisory approval is required to show that eligibility has been met. Requestor must submit an approved application to the Training Office to qualify for this program.

**Evidence of Completion:** Employees must provide the supervisor and the Training Office with evidence of satisfactory completion no later than four weeks after each course is completed. Such evidence may be an official grade card or transcript from the institution. If that is not possible, written confirmation of course completion from the instructor or institution will be accepted. A grade C or better, or pass grade in a pass/fail course is required.

**Departmental Reimbursement:** When allowable costs exceed the current STRP limit, the excess cost may be partially or fully reimbursed by the employee’s department. Departmental reimbursement is at the department’s discretion and is determined on the basis of available departmental funds for training. Any questions concerning reimbursement of excess costs should be directed to the Training Office, ext. 2365.

**Application Procedure:** An application should be completed and submitted by the employee each year he/she wishes to attend. Application information will be automatically sent to current STRP participants each fiscal year. Forms will be available at the SLAC Benefits Office (Bldg. 041, Room 236) and the SLAC Training Office (Bldg. 041, Room 238). Online forms are located at [http://hrweb.stanford.edu/training](http://hrweb.stanford.edu/training).

**Exceptions:**

- For the 99/00 school year only, if tuition was prepaid for Fall 1999, Stanford will reimburse the staff member directly. This is a one-time reimbursement method associated with the program startup. Proof of payment will be required for this reimbursement.
- No payments are made for this program from SLAC Accounting.
- No required text fees are covered under this program.
- The University pays the institution directly. The employee submits the documentation before taking the class, thus relieving the employee of any out-of-pocket expenses (except required texts.)
Training Reimbursement Guidelines

SLAC 90% Tuition Reimbursement Program

Purpose: The SLAC 90% Tuition Reimbursement Program supports employee development by providing partial (up to 90%) reimbursement of tuition costs for courses meeting requirements of a certificate or degree program related to current performance or planned career development.

Eligibility: Applicant must be working a minimum of 50% as a regular employee at SLAC. There is no service requirement for eligibility for this program.

Allowable Expenses: SLAC 90% Tuition Reimbursement assistance is allowable for certificate or degree-related programs. The allowance can be used to cover class fees, books, and taxes. STAP funds may be used in conjunction with this program, and cover required text fees. Payments are made for this program through SLAC Accounting.

Supervisory Approval: Staff member must submit an application to the Training Office for approval. This application is reviewed by the Directorate and the Salary Committee before the employee is given approval to use these funds (up to 90% of the total cost).

Evidence of Completion: Employees must provide the supervisor and Training Office with evidence of satisfactory completion after each course is completed. Such evidence may be an official grade card or transcript from the institution. If that is not possible, written confirmation of course completion from the instructor or institution will be accepted. A grade C or better, or pass grade in a pass/fail course is required.

Application Procedure:

An application should be completed and submitted by the employee each year he/she wishes to attend. Forms will be available at the SLAC Training Office (Bldg. 041, Room 238). SLAC staff should submit applications directly to the SLAC Training Office.

Reimbursement Procedure:

- After approval, the requestor may submit the STAP form to the Training Office (Bldg. 041, Room 238) with appropriate accompanying backup documentation. The Training Office may authorize up to $800/year in STAP funds as advance payment to the employee under this program.

- The Training Office returns a copy of the STAP form to the requestor with a note to resubmit that form with their course completion documentation to the Training Office for final reimbursement processing.

- Upon completion of the course the employee submits the copy of the STAP form to the Training Office for reimbursement of the remainder (up to 90%) of the total cost. Original payment and grade documents must accompany the STAP form.
Training Reimbursement Guidelines

The Training Office will send the STAP form to Accounting for reimbursement to the employee.