Staff Educational Assistance Plan
Eligibility, Rules, Procedures and Instructions

Because this Plan is regulated by the IRS, HR is unable to allow exceptions to the following rules and procedures. Please be sure to read the following information carefully.

Employee Eligibility Checklist
✓ Must be in benefits-eligible status throughout the entire course.
✓ Eligible within 30 days of your one-year anniversary of benefits–eligible employment.
✓ Prior service may count towards the waiting period—contact the benefits team if you worked for the University within five years of your rehire date.
✓ Enrolling in an undergraduate or graduate degree program, or an eligible certificate program, accredited by agencies recognized by the U.S. Department of Education.

Plan Rules Checklist
Course Eligibility
✓ Up to two courses per term, six courses per fiscal year.
✓ Enrolling in degree or certificate program: must receive course credit as well as a grade or pass in a pass/fail designation.
✓ Not enrolling in degree program: course provides added skills, knowledge, and credentials needed for your current position or will qualify you for other jobs at Princeton University. Course credit as well as a grade or pass in a pass/fail designation must be received.
Grade Requirement
✓ Obtain a C or better, or pass in a pass/fail course.
✓ For doctoral dissertation fees, no grade required for a maximum of two plan years.
Reimbursement
✓ 85 percent of tuition and mandatory educational fees up to a maximum of $5,250 per fiscal year (July 1–June 30). As of July 1, 2020, textbooks and/or mandatory online course materials are included as an eligible expense for reimbursement.
✓ Up to $5,250 in a calendar year is treated as non-taxable by IRS. If reimbursement during the calendar year totals more than $5,250, the excess is taxable under IRS regulations.
✓ If money is received from other sources, such as scholarships, grants or awards designed to cover the same charges, the reimbursement provided by Princeton will not exceed the remaining eligible costs, if any.
✓ Doctoral dissertation fees are reimbursable for a maximum of two plan years.
✓ Standardized test fees are reimbursable if you receive a grade and course credit by completing the standardized test.
✓ Includes mandatory educational fees of technology, activity, health services, and registration. Excludes parking, health insurance, and certain fees, e.g., program application, portfolio assessment, graduation, diploma, credit transfer evaluation.

General
✓ The University reserves the right to terminate or amend any plan, at any time, for any reason.
   ✓ Refer to the HR website at **https://hr.princeton.edu/thrive/well-being-resources/staff-educational-assistance-plan** for additional details, limitations and information. Email us at benefits@princeton.edu or call (609) 258-3302.

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Instructions

To Add a New Course (this must be done within 31 days of the start of the term):

1. Click **Request a New Course Approval**.
2. If no courses have been entered to date, begin by entering your course information in the blank fields.
3. You can look up the school number by clicking on the magnifying glass and entering the school name. If there is no number listed for the school you are attending, just enter the school name in the next field.
4. If enrolling in a certificate program, please provide the link to the schools website in the comment section.
5. Once all information has been entered, click **Enter Tuition Cost Information**. Here you can enter the cost of tuition and mandatory fees, along with information on any grants and scholarships you may be receiving.
6. Click **OK** and you will return to the course information page. Review the information and then click **Submit Course for Approval by HR**.
7. Once you have read the acknowledgement information, check the box and click **Submit Application for Approval by HR**.
8. You should then receive an email confirmation.
9. Your supervisor will also be notified by email that you have applied for a course.
10. If enrolling in more than one course, you can then add an additional course by clicking **Add Another Course**.
11. Once your course is approved or denied, you will receive a second email. You can also check the status of an application by logging back in to HR Self Service.

To Drop a Course:

1. Click **View** next to the course you wish to drop. All of your courses will appear.
2. Find the course you wish to drop and change the course status to **Dropped**.
3. You can then enter a replacement course, if applicable, by clicking **Add Another Course.**

To Request Reimbursement for a Course (this must be done within 90 days of the course end date):

1. Click **View** next to the course you recently completed. All of your courses will appear.
2. Find the course you have just completed and change the course status to **Completed**.
3. A yellow box will appear that says **Request Reimbursement**. Click on that box.
4. You will now need to upload your itemized bill, official grade report or transcript, and receipt for textbooks and/or mandatory online course materials not listed on the bill. First find the document type by using the drop down list. Then enter a description for the document. Click the yellow **Add Attachment** box to browse and upload your document.
5. You must then click the **Save and Submit Request to Human Resources** box.
6. You will receive email confirmation that the course was submitted for reimbursement.
7. Once your reimbursement is processed you will receive email confirmation.