



DEPARTMENT OF HEALTH SERVICES  
HUMAN RESOURCES POLICY & PROCEDURE

**TITLE: 104 – EMPLOYEE DEVELOPMENT AND TRAINING**

**DATE ISSUED: DECEMBER 2, 2012**

**DATE REVISED: N/A**

**104.01 INTRODUCTION**

The Department of Health Services (DHS) Employee Development and Training policy applies to all permanent, project and probationary employees. It is intended to establish uniform procedures and standards for participation in and/or reimbursement of employee development activities that are outside those offered by the Department's Office of Employee Development and Training (OEDT).

**104.02 DEFINITIONS**

**Approved Educational Program:** When an employee has received prior approval to participate in a program or series of educational activities that will result in the employee receiving a degree or certification in a specific area of study closely related to their current job or classification series.

**Career Related Training and Educational Activities:** Activities which are necessary for an employee to progress through a classification series related to their current position or to advance to another position within a similar career path. Reimbursement will not apply to elective and other non-career related courses. Career progression programs include training, education or professional improvement. Career relatedness shall be determined by the employer. This policy does not include authorization to attend activities for occupational fields not directly related to the employee's current or closely related job classification series.

**Job Related Training and Educational Activities:** Training, education or professional improvement programs which aid an employee in acquiring, improving or updating skills and knowledge which management has specified as necessary or directs the employee to attend in order to meet job performance expectations.

**Personal Development Training and Educational Activities:** Training or education for an employee's personal development not directly related to employee's current position or recognized by employer as career related.

**104.03 POLICY**

(1) Job Related Activities:

- (a) Job related or supervisor directed activities will be assigned under this policy only when the employing unit has verified funding is available to cover all costs. An employee's participation

in job related training shall be without loss of pay and related expenses shall be the responsibility of the employer.

**Note: hours spent in excess of 40 during the work week (including travel time) involved with job related training may require compensation at the premium rate for such additional hours.**

(2) Career Related Activities:

- (a) Attendance and payment of costs associated with career related training and educational activities are at the discretion of the appointing authority. Time off may be granted without loss of pay or taken as authorized accrued leave or compensatory time off or may be accommodated using alternative work patterns. No employee will be granted unpaid time off during normal business hours to attend or participate in career related training activities.
- (b) Employees enrolled in institutions of higher education in the State of Wisconsin and who have approval to attend career related courses which are in an approved educational program and who successfully complete such coursework, may be reimbursed up to seventy-five percent (75%) of actual tuition costs, not to exceed seventy-five percent (75%) of the cost of tuition in effect at UW-Madison for up to six (6) credit hours each semester, not to exceed fifteen (15) credits each calendar year. On-line courses may be approved when an on-line course is to the benefit of the employer.
  - The employer may also reimburse the employee for laboratory costs, books and required student fees at the discretion of the appointing authority. This policy does not authorize the payment of expenses for items that are not directly associated with the taking of a course. These fees may include, but are not limited to, student activity, health clinic, daycare, athletic, legal clinic, bus passes, or parking/transportation expenses.
  - Reimbursement is payable to employees who are current employees of DHS when the course is completed. To receive reimbursement, employees must meet the following conditions:
    1. Have worked for the agency for one year;
    2. Not be on original probation;
    3. The last PPD must be satisfactory; and
    4. The employee has had no disciplinary actions within the past twelve (12) months
  - Employee reimbursement will be limited to one (1) degree or educational program during the employee's tenure with DHS.

**Note: The availability of money to support reimbursement expenditures for Employee Development and Training requests shall be a factor in determining approval or denial of each request.**

(3) Personal Activities:

- (a) The employer shall not reimburse employees for any costs associated with such activities. Time off may be granted by the appointing authority. If granted, such time shall be without pay, taken as authorized accrued annual leave, or authorized through the use of alternative work patterns.

(4) Maintenance of Licensure or Certification:

- (a) Employees are responsible for all costs associated with maintaining licensure or certification. Where provided for by the compensation plan or other relevant authority, the department may pay

for the continuing education credits necessary to maintain a license or certification in the State of Wisconsin for some positions.

- (b) The department may grant leave with pay each calendar year to employees for the sole purpose of meeting continuing education requirements. At the discretion of the Division Administrator or their designee, attendance may be extended to include travel, lodging and/or other related expenses.

#### **104.04 ROLES AND RESPONSIBILITIES**

##### (1) Employees

- Submit a written request to attend on work time or receive reimbursement for any educational course or activity prior to the commencement of the course or activity.

##### (2) Human resources representative

- Coordinate review and communication of requests between supervisors, employees, and appointing authorities.

##### (3) Supervisors

- Review formal requests for employee development and training after review by the human resources representative and recommend action to the appointing authority.

##### (4) Appointing Authorities

- Review and approve or deny requests for employee development and training in accordance with this policy.

#### **104.05 PROCEDURES**

For training outside of DHS, where an employee is requesting to receive reimbursement or approved time off, an [IN-STATE TRAINING/TRAVEL REQUEST form](#) (F-25842B) must be completed.

##### (1) Obtaining Approval

- (a) Employee submits completed forms to the employee's designated human resources (HR) representative for review. Human resources forwards the request to the employee's immediate supervisor to review. The supervisor will make a recommendation and forward the request to fiscal staff and the appointing authority for approval as required in each employing unit. Requests for reimbursement or time away from work should be submitted no less than thirty (30) days prior to the start of the course or activity to ensure adequate processing time. Failure to submit the necessary forms in a timely manner may result in denial of the request.

**Note: Reimbursement is only tendered after successful completion of the course or activity. There will be no advance payments for such activities or related expenses. No contract should be entered into with educational institutions on behalf of the employee.**

- (b) When requesting reimbursement the following documentation must be attached:

1. Tuition Reimbursement – course description and course requirements facility fee schedule identifying per credit costs, associated lab fees, cost of textbooks or other fees directly associated with the course for which the employee may be requesting reimbursement
  2. Conferences/Workshops – brochure, event advertisement, cost schedule, dates of event
  3. Justification for taking the course, workshop or conference (supports the reason listed on the request form).
  4. Proposed alternative work schedule, if applicable
  5. Dates, type, and amount of leave to be used, if applicable
  6. Other documents to support the request that provides information about the event or course
- (2) Acknowledgement of Approval or Denial
- (a) Employees approved for reimbursement of career related activities shall receive written approval or denial confirmation prior to the start of the activity.
- (3) Reimbursement
- (a) With prior approval, at the conclusion of the educational activity or course the employee shall submit a copy of the approved training request form with a grade report indicating a passing grade equivalent to a “C” or better, and a copy of a receipt or other evidence showing that the employee has already paid for the expenses. This information should be provided to the employing unit’s fiscal staff for processing. These documents are necessary if the reimbursement is to be paid directly to the employee.

**Note: Under certain circumstances employer provided educational assistance (reimbursement) payments may be taxable to an employee. In cases where the employer provided educational reimbursement, payments are taxable. The Department will properly include those payments in the employee’s W-2. Direct questions about taxability of employer provided educational payments to your tax advisor or see IRS publication 970.**

## **104.06 MAINTENANCE OF RECORDS**

Completed In-State Training and Travel forms will be maintained by each Division. Employing units may designate in what area (e.g. HR, Training) original forms will be kept. Employees should receive a copy of their approved/denied requests. A copy of the approved request is sufficient to be used with a travel voucher.

## **104.07 REFERENCES**

[Chapter 230, Wis. Stats.](#)  
[ER 44, Wis. Adm. Code](#)

#### **104.08 ADMINISTRATIVE INFORMATION**

This policy was created on December 2, 2012 to establish a consistent and uniform Employee Development and Training policy across DHS. This policy supersedes all previous DHS employee development policies. Where it is in conflict with other departmental procedures, this policy shall govern.

#### **104.09 ATTACHMENTS**

[IN-STATE TRAINING/TRAVEL REQUEST form](#) F-25842B (07/20/11)