

Employee Development Fund

Frequently Asked Questions

This Frequently Asked Question (FAQ) document provides insight on information commonly requested about the Employee Development Fund (EDF) Reimbursement process. These questions are organized into the following sections:

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Starting a EDF Reimbursement Request

Q: What are the four required items that need to be submitted?

A:

Four items are required for an EDF reimbursement request to be fully complete and ready for review:

1. EDF Request for Reimbursement
2. Proof of Cost
3. Proof of Payment
4. Proof of Completion

Q: How do I create an EDF Application for Reimbursement?

A:

- Complete an EDF Application for Reimbursement in OAKS HCM by logging into myOhio.gov.
- Select the “My Workspace” menu, then select “Employee Development Fund.”
- Now click “Add a New Value tab.”

Q: What do I need to do to be reimbursed?

A:

Complete the EDF Application for reimbursement with the following documents (must include requesting employee’s name and/or SQUID in each filename) within 90 calendar days upon completion of the class/event:

- Proof of Cost (brochure, flyer, web page, provider letter that shows the course/event costs).
- Proof of Payment (front and back of cancelled check, copy of credit card statement, paid receipt submitted on provider letterhead; all documents should include the requesting employee’s name).
- Proof of Completion (certificate of attendance or completion, letter grade, letter or email acknowledging attendance on provider letterhead).

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Q: When will I receive my reimbursement?

A:

Generally, within 30 calendar days from the date of approval.

Q: How will I receive my reimbursement?

A:

The eligible reimbursement amount will appear in the employee's paycheck.

Q: Is my reimbursement taxable?

A:

EDF reimbursements are taxable when the reimbursed amount exceeds \$5,250 within a given calendar year.

- Current IRS Code specifies that paid educational assistance benefits up to \$5,250 per calendar year are exempt from income tax.
- When funds exceeding \$5,250 are paid for non-work-related educational assistance, the funds are considered income and may be subject to income tax.
- Any amount reimbursed to an employee for professional license/certification or professional membership expenses will be treated as taxable income and corresponding payroll taxes will be withheld from such amounts.
- To designate a course as work related and determine tax exemption, employees who receive educational assistance benefits should view the IRS information via this link:
 - [IRS Publication 970 \(refer to Chapter 12\)](#)

Q: Can a request be pre-approved by EDF?

A:

No, tuition, events, or training cannot be preapproved or prepaid. Funds are reimbursed once requirements are met. Questions related to approval requirements can generally be answered by reviewing the policy appropriate to the employee's classification.

Q: What alternatives are available to submitting an EDF Reimbursement Request online?

A:

The EDF Reimbursement Request tool is the only method available to request a EDF reimbursement. The tool is available via MyOhio.

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EDF Policy & Procedures

Q: How much money is allotted per employee group per fiscal year?

A:

Listed below is the maximum reimbursement for eligible expenses per employee group for each fiscal year:

- Exempt – see HR-33, Section III-F for details:
 - Full time: maximum of \$4,500.
 - Part time: maximum of \$2,250.
- Unit 2/FOP – see HR-34, Section III-D for details: maximum of \$5,000.
- OSTA – see HR-35, Section III-D for details: maximum of \$7,500.
- OEA/SCOPE – see HR-36, Section III-D for details: maximum of \$4,500.
- SEIU 1199 – see HR-37, Section III-D for details: maximum of \$3,500.

Q: If an employee pays for a learning activity in one fiscal year, is it eligible to be reimbursed in the next fiscal year?

A:

Yes, provided the learning activity was completed within the previous 90 days and meets the “Three Proofs:”

1. Proof of Cost
2. Proof of Payment
3. Proof of Completion

Note = to ensure the employee’s Three Proofs are correctly aligned to the current request, the name of each document must include the requesting employee’s name and/or SOUID.

Q: What grades are required to receive tuition reimbursement?

A: Employees must attain a “C” grade or better or receive a “pass” if assessed on a pass/fail basis to receive tuition reimbursement.

Q: If a provider doesn’t give proof of attendance for an event I have attended, can I still be reimbursed?

A:

No, Proof of Attendance is required.

- Employees are required to obtain a letter on the provider’s letter or email from the provider’s email account that certifies attendance or completion of course/event.
- The employee’s name, the event name, and date of completion must be on the proof.

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Q: If my reimbursement request and/or documentation submission is not correct or incomplete, what will happen?

A:

Employees will be notified by email of the error or missing information. The process to correct a request includes:

- Resubmit the document with the correct and/or complete information
- Notify EDF via email about the resubmitted documents: dashrd.edfunds@das.ohio.gov

Program Eligibility

Q: How do I know if my class is eligible for reimbursement?

A: Tuition, training, conferences, and other professional development activities are expected to provide knowledge and/or skills that relate to a job classification currently used by the State of Ohio as listed in the Classification Specifications section of the DAS web page:

[Classification Specifications](#)

Q: Can I use EDF to take training courses offered at a college or university?

Yes, if the course offers a certificate of completion or continuing education credits (e.g., CEUs/CLEs).

Q: How do I find out if my school or college is accredited?

A:

Coursework must be provided by accredited college or university named in the U.S. Department of Education's Database of Accredited Postsecondary Institutions and Programs. Click the following link and follow the instructions to verify the status of the college or university name: <http://ope.ed.gov/accreditation/Search.aspx>.

Q: What grades are eligible to receive tuition reimbursement?

A:

To receive tuition reimbursement, employees requesting reimbursement must:

- Attain a "C" grade or better
- Receive a "pass" if assessed on a pass/fail basis

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Q: What is not eligible for reimbursement under the events program?

A:

- Generally, non-instructional fees, combined fees, general fees including memberships, subscriptions, licenses, certifications, matriculation, course fees, testing or examinations, computer hardware, software, non-instructional field trips, travel expenses e.g., parking, travel, food or lodging expenses.
- For additional details, see “Attachment 1” of the policy aligned to the employee’s job:
 - HR-33: [Exempt Employees EDF Policy](#)
 - HR-34: [State of Ohio Unit 2 Association EDF Policy](#)
 - HR-35: [Ohio State Troopers Association \(OSTA\) EDF Policy](#)
 - HR-36: [State Council of Professional Educators OEA/NEA EDF Policy](#)
 - HR-37: [SEIU District 1199 EDF](#)

Q. Can I be reimbursed if my federal student loan pays for all or part of the cost?

A:

Yes, because the employee must repay the loan.

Q: Can I be reimbursed for courses or events paid for in part or in whole by scholarships, grants, or military discounts?

A:

If a degree program or training/event is paid in part by a grant or scholarship and the employee paid for the balance, EDF will reimburse the part paid by the employee.

Q: How do I know if my class qualifies for reimbursement?

A:

Courses/events are expected to provide knowledge and/or skills, which support the major job classifications listed in the Classification Specifications section of the DAS web page: [Classification Specifications](#)

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Q: Can I be reimbursed for the cost of my professional license and/or membership to professional organizations?

A:

If the employee needs the license in order to fulfill work responsibilities, then:

- Per HR-33, Exempt employees are eligible for reimbursement.
 - Exempt employees may be reimbursed for one professional certification or for one professional license per fiscal year.
 - Exempt employees may be reimbursed for annual membership dues to one professional association or trade organization per fiscal year if the association/trade organization is related to the agency's business and the employee is performing duties for the agency that are related to the professional organization's focus or mission.
- Union contracts currently do not permit licenses and memberships reimbursements.

Q: How long do I have to submit my documents after my course/event is over?

A:

Employees have 90 calendar days from the last day of the course or event to submit the required documentation.

Q: Can I be reimbursed for books?

A:

Yes, provided the books are required for class (see policy Section III-B for details):

- Employees must submit:
 - Itemized list of book charges included as part of the enrollment invoice
 - Paid receipt (Proof of Payment).
- Reminder = EDF does not pay for taxes, shipping, or handling.

Q: If I don't use all my current fiscal year funding, will it carry over?

A:

No, the funds expire at the end of the fiscal year.

Q: How long do I have to wait to use EDF benefits?

A:

Employees are eligible upon hire.

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Q: Are online seminars and workshops eligible for reimbursement under the EDF Reimbursement policy?

A:

Yes, online seminars/workshops are eligible for reimbursement when they offer a certificate of completion or continuing education credits (CEUs/CLEs).

Tips & General Information

Q: If I am laid off after my course/event starts, will I be reimbursed?

A:

Eligible employees who – because of a layoff are separated or moved to a non-participating bargaining unit – are still eligible for reimbursement if all other requirements are met and the following conditions are in place:

- The professional development activity began prior to the effective date of the position abolishment/layoff; or
- The course/event start date is within 90 calendar days after the employment status change date in myOhio.

Q: Will I get release time to attend classes/events during working hours?

A:

Authorization of release time for employees to attend classes/events is at the discretion of the employing agency, pursuant to their internal policies. Check with the Human Resources Division and the employee's supervisor for more information.

Q: Are EDF reimbursements impacted by the availability of funds?

A:

Disbursement of funds is contingent upon the availability of funds at the time the request for reimbursement is submitted.

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Q: If my Reimbursement Request is denied, is there an appeal process?

A:

Yes.

- The EDF Appeal of Decision form is available on the EDF webpage: [EDF Appeal of Decision](#)
- Complete the form, and submit it by email to: dashrd.edfunds@das.ohio.gov.
- A response is provided to the employee within 30 days of the receipt of the appeal.

Q: How is the EDF Program funded?

A:

The program is administered by the DAS State Human Resources Division and is funded by:

- Exempt employees: participating agencies contribute a set amount for each worked/approved leave hour for each full-time and part-time permanent exempt employee.
 - Bargaining unit employees: the fund amount and individual limits are determined during collective bargaining and written into each bargaining union contract.
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