



FINANCIAL SUPPORT FOR APPROVED STUDY: GUIDELINES FOR ACADEMIC STAFF

OVERVIEW

The University of South Australia provides an environment and a range of opportunities for staff to maintain and develop professional knowledge, skills and expertise. The University may provide financial support for tuition fees through the Human Resources Unit's Study Assistance Fund to support staff to undertake an approved program of study.

ELIGIBILITY

Academic staff on a full or part-time continuing or fixed term contract of one or more years can apply for financial support for tuition fees if they

- are enrolled in an approved program of study
- are studying in addition to their normal duties
- have prior approval for the study for which financial support is claimed
- are maintaining a satisfactory level of work performance
- have personally paid for the expenses claimed and have not received other financial support for their studies, for example, payment by the local area
- are making satisfactory progress with their studies

Staff who are employed on successive fixed term contracts which individually are not in excess of twelve months are eligible to apply for financial support when they have completed twelve months of services provided there is no break in service.

Financial support, as outlined in these guidelines, does not apply to senior staff who are covered by the Senior Staff Collective Agreement or, where applicable, staff on an Australian Workplace Agreement.

GUIDING PRINCIPLES

The University's approach to supporting staff to undertake further studies is underpinned by the principles of performance management and based on reciprocity and shared commitment.

RELEVANT TERMS

Financial support refers to the reimbursement of a proportion of tuition fees from the Human Resources Unit's Study Assistance fund for an approved program of study.

Supervisor refers to the person who directly supervises or manages the applicant and is responsible for performance management.

Senior manager refers to senior staff as per the Vice Chancellor's authorisation, for example, Head of School, Research Institute Director.

Industrial instrument refers to the applicable Collective Agreement, Award, Australian Workplace Agreement, contract of employment or legislation.

APPROVED PROGRAM OF STUDY

The performance management and review process is the key formal medium for discussing and recording staff members' professional and career development goals and actions.

UniSA may support staff to gain a qualification that is relevant to their current position or career goals and maximises their contribution to the achievement of the University's goals. Approval is generally given for study conducted by a university that leads to a qualification compatible with the Australian Qualifications Framework.

FINANCIAL SUPPORT

The University, through the Human Resources Unit's Study Assistance Fund, may reimburse a proportion of tuition fees for Commonwealth supported and fee paying university courses.

Expenses for studies undertaken while staff are on paid leave such as Professional Experience Program leave are not reimbursed through Human Resources Unit's Study Assistance fund.

The level of financial support is dependent on the allocated budget in the Human Resources' cost centre and the quantum of claims.

FINANCIAL SUPPORT APPLICATION PROCESS

The process for applying for financial support and the application form are provided in Appendix One.

APPEALS

Staff members are referred to the Staff Appeals Policy (HR - 6.4) or procedures contained in the applicable industrial instrument with respect to grievances regarding financial support.

RESPONSIBILITIES AND AUTHORITIES

Responsibility for the application of these guidelines is a joint responsibility of the staff member, their supervisor and the senior manager.

The Human Resources Unit is responsible for the development and continuous improvement of these guidelines.

ASSOCIATED DOCUMENTS

- HRIS 031 – Financial Support Application
- Performance Management Policy (Policy No. HR-25.0)
- Academic Staff enrolled in University Programs (Policy No. A31.2)
- Guidelines for academic staff for the commencement and completion of doctoral qualifications
- 2006 Academic & Professional Staff Collective Agreement (as amended or replaced)

FURTHER ASSISTANCE

Management and staff may seek further advice from:

- The local HR Coordinator/contact
- The Human Resources Unit
- The Human Resources Web Site

APPENDIX 1: APPLYING FOR FINANCIAL SUPPORT

Call for applications

Claims for study completed in the academic year are submitted to the Human Resource Unit by the end of February of the following year. Claims will not be backdated for study in previous academic years.

An announcement reminding staff of the due date for application for financial support is posted on the staff portal – myUniSA – in January of each year.

Submitting an application

Supervisor refers to the person who directly supervises or manages the applicant and is responsible for performance management.

Senior manager refers to the academic or administrative manager as per the Vice Chancellor's Authorisations, for example, Head of School, Research Institute Director, Unit Director, Division Manager.

1. Staff member completes the HRIS 031 Financial Support Application form and forwards it, with relevant documentation, to their supervisor for endorsement. Relevant documentation includes:
 - Evidence that they have prior approval for the studies for which they are claiming reimbursement e.g. a copy of the Study Release application form or the relevant section from their performance management and development plan.
 - Documentation showing enrolment and fee information, such as the Commonwealth Assistance Notice (CAN) or Enrolment Confirmation Notice (ECN).
 - Evidence of satisfactory progress e.g. copy of academic transcript or letter from study supervisor.
2. The supervisor either recommends or does not recommend the application and forwards it to the senior manager for approval.

If the application is not approved the senior manager outlines the reason in writing.

3. Once approved, the completed application form is sent directly to:
Study Assistance Committee
HR Unit
Level 3, 101 Currie Street

Confirmation of receipt of application

Staff will receive an email from the HR Unit acknowledging receipt of their application.

Reimbursements

The Study Assistance Committee will meet to consider applications and make recommendations to the Director: Human Resources.

Staff will be advised of the amount to be reimbursed and the date it will be paid through the payroll system.

Any payment will be incorporated in the individual's taxable income on their group certificate. Tax will be deducted, however, staff should consult their tax advisor regarding amount claimable as a tax deduction in the relevant tax year. Original copies of all documentation should be retained for audit purposes.



FINANCIAL SUPPORT APPLICATION

Updated
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PERSONAL DETAILS

Family name: _____ Given _____
Staff ID number: _____ Professional/Academic (please circle)
Position title: _____ Division/Portfolio: _____
School/Unit/Institute: _____ Campus: _____
Program of Study: _____ Institution and location: _____
Date when studies commenced: _____ Expected date of completion: _____

TO BE COMPLETED BY APPLICANT

I have attached:

- ✓ Proof of study approval prior to commencement of study for which payment is being claimed e.g. Study Release application form or relevant section of my performance management plan.
- ✓ Documentation showing enrolment and fee information eg. Commonwealth Assistance Notice (CAN) or Enrolment Confirmation Notice (ECN).
- ✓ Evidence of satisfactory progress, e.g. copy of academic transcript or letter from study supervisor.

I certify:

- ✓ This request for financial support is directly related to my approved program of study.
- ✓ I have successfully completed the relevant course(s)/subject(s) within normal time limits.
- ✓ That I am studying in addition to my normal duties.
- ✓ That I have not received financial support for the expenses claimed from any other source e.g. School, Unit or Division and I have personally incurred these expenses.

NAME OF APPLICANT:

(please print) _____

SIGNATURE OF APPLICANT: _____ DATE: _____

Applicants are advised that any allowance will be incorporated in your taxable income on your group certificate. Tax will be deducted, however, you should consult your tax advisor regarding amount claimable as a tax deduction in the relevant tax year. You should retain originals of all documentation for audit purposes.

Claims for study completed in the academic year are due to the Staff Assistance Committee, Human Resource Unit, Level 3 – 101 Currie Street, City West Campus by end February of the following year.

TUITION FEES		
Academic session(s) e.g. study period 1; semester 1	Year	Course Fee amount
TOTAL FEE AMOUNT CLAIMED		

ENDORSEMENT

To be completed by the supervisor with responsibility for performance management

- This study supports development needs identified through performance management and development discussions. I recommend this application for financial support.
- I do not recommend this application for financial support for the following reason/s:

NAME OF SUPERVISOR: (please print) _____
SIGNATURE OF SUPERVISOR: _____ DATE: _____

To be completed by the senior manager as per the Vice Chancellor's Authorisations

- Approved Not approved for the following reason/s:

NAME OF SENIOR MANAGER: _____
(please print)

SIGNATURE OF SENIOR MANAGER: _____ DATE: _____