



**Education Reimbursement Benefit
AMER (US & Canada)
Calendar Year 2016**

Program Overview: Salesforce will reimburse employees cost of fees, tuition, and books up to \$5,250 per calendar year for educational courses taken at a university, college or school. The purpose of this Benefits program is to support employees in furthering their higher education and to promote continuous learning. **Employee corporate cards should never be used to pay for tuition, fees, and books.**

Training organizations, certifications and specialized training are not approved under this program. Employees can submit these ineligible training expenses via Concur, under "Offsite Education & Seminars" with manager's approval.

Eligibility:

- Full-time employees
- Receive a final grade of 'C' or better, a 'Pass' if the course is Pass/Fail, or Certificate of Completion
- Actively employed with Salesforce at time of reimbursement
- PIP (Performance Improvement Program) employees are not qualified

Eligible Expenses: 100% of the cost of fees, tuition and books up to \$5,250 per calendar year for courses offered by accredited academic institutions, i.e. university or college and language schools. This program is not run on a fiscal year. The Education Reimbursement program is run on a calendar year. The approval of a school or course will be determined after the employee has submitted the Education Reimbursement Application. Travel expenses and food/beverage are not approved under this program.

Tuition Reimbursement covers degrees and individual courses for continuing education that:

1. Directly contribute to the achievement of the employee's assigned job responsibilities with Salesforce
2. Be part of a program leading to a further degree pertaining to the employee's work
3. Not currently offered through our internal [Leadership and Employee Development](#) curriculum



Reimbursement Process:

- **Employee corporate cards should never be used to pay for tuition, fees, and books.** Pay for tuition, fees and books using your personal funds. Maintain copies of all receipts.
- Upon completion of the course, submit all receipts, a transcript or certificate of completion, and the application filled out with manager's signature by logging a ticket on Concierge.
- If still actively employed with Salesforce, reimbursement will be paid in the last paycheck of the month provided receipts and grades are received by the 10th of the month. Receipts and grades received after the 10th of the month will be paid out in the last paycheck of the following month.
- **The annual reimbursement cycle ends December 10.** This is the final day you can submit your documentation to be eligible for the same calendar year reimbursement funds. Documents received after December 10th will be funded through the following calendar year's funds.



Education Reimbursement Application

Request Date: __/__/__ FTE: Y or N

Employee Name:

Employee ID number: _____ Employee Cost Center _____

Employee's Manager Name: _____

Institution Name: _____

Course Name: _____

Dates of Course: _____

Cost of course: _____

Course Description: _____

Justification for Enrolling in Course:

Terms:

- I understand that reimbursement is never guaranteed.
- I understand that the Education Reimbursement Program is run on a calendar year and all documentation must be turned in by December 10 to be eligible for the same calendar year reimbursement funds.
- I understand that the course must be taken at a nationally accredited university, college or school.
- I am only eligible for reimbursement if I receive a final grade of 'C' or better, a "Pass" if the course is Pass/No Pass, or a certificate of completion.
- I understand that my corporate card should never be used to pay for tuition, fees, and books.

Employee's Signature

Employee's Manager Signature



***For Reimbursement, please log a ticket via Concierge**

2016 Educational Reimbursement FAQ's

Q: What's new with Educational Reimbursement?

A: Starting February 1, 2015, the Educational Reimbursement benefit for AMER employees (US and Canada) will be used to reimburse expenses from accredited educational institutions only. We will be eliminating the "exception list" of vendors who've historically been approved for Educational Reimbursement dollars. This includes Storyleaders, Henderson Group, AMA, Academy X, General Assembly, and others. **Any training vendors and all other non-accredited institutions will no longer be approved through the Education Reimbursement benefit.**

Q: Why are these changes being made?

A: To scale for growth, this program will go back to its original intent – *"Salesforce will reimburse employees cost of fees, tuition, and books up to \$5,250 per calendar year for pre-approved, job-related educational courses taken at a university, college or school. The purpose of this program is to support employees in furthering their higher education and to promote continuous learning."*

Q: What is the impact to the non-accredited institutional vendors who've historically been used with Ed Reimbursement dollars?

A: All employees wanting to take outside workshops from formerly approved vendors are free to do so with manager's approval. The cost will now be picked up by the employee's cost center. FYI, this process is already in place in all other Salesforce regions.

Q: How has the approval and payment process changed with the educational institutions?



A: There are no changes to this process for college and university programs. Salesforce will reimburse employees cost of fees, tuition, and books up to \$5,250 per calendar year for educational courses taken a university, college or school.

Q: I'd like to take a training course offered by a company that isn't an accredited educational institution. What do I do?

A. Training courses are not supported under the Education Reimbursement Program. Here are some options:

- 1) Review the Talent Development Site ([Dreamjob Navigator](#)) to see if we have a similar internal offering.
- 2) Speak to your manager and Finance Business Partner to propose the course be paid through your department budget.

Q: Are workshops, conferences, seminars, and T&E supported under this program?

A. No. This program is for college and university-level courses only.

Q: Would the engagement of an executive coach or consultant be covered under this program?

A. No, this program is for college and university level courses only.

IRS Notification:

Salesforce is in alignment with IRS rules which mandate that reimbursement transactions be posted to the year in which the reimbursement was made. IRS rules state this program is "per calendar year" and cannot post items paid from the previous year. Anything above the IRIS limit of \$5250.00 would be considered taxable income.

All employees are responsible for turning in their documentation.

For more information on **Qualified Educational Assistance** see **(Section 127)** [here](#).