

Educational Assistance Program

Revision Date: 4-29-24

Human Resources: Benefits

1. Purpose

The Educational Assistance Program provides team members with financial support to learn new skills and pursue additional degrees and certification, making them more effective in their current roles and preparing them for future career advancement at Augusta Health.

2. Scope

Full-time and regular (benefited) part-time team members are eligible as of date of hire.

3. Definitions: N/A

4. Policy

- A. The policy outlines the guidelines and procedures for team members seeking financial support to pursue further education, training, or certification. Team members are encouraged to grow professionally in their careers.
- B. Team members can use the educational assistance program for eligible education expenses and/or student loan repayment assistance for job-related education (for their current Augusta Health job or to prepare them for future roles at Augusta Health).
- C. This could include development for a specific skill, preparing for or maintaining a license or certification, taking educational classes, or earning a degree.

5. Procedure

A. General Guidelines

- 1. Augusta Health will reimburse eligible team members for tuition, book, and lab fee expenses for team members continuing education through an accredited program that either offers growth in an area related to their current position or that may lead to promotional opportunities. This education may include college credit courses, continuing education unit courses, seminars and certification tests that are job-related.
- 2. IRS regulations limit tuition reimbursement programs to \$5,250 per calendar year for tax-free benefits. If you are reimbursed less than that amount, you should not have any benefits to report on your annual tax return. Tuition benefits paid beyond that amount would be subject to taxation. Under IRS rules, tuition reimbursement is not tax-free for courses that involve sports, games, or hobbies that (a) do not have a reasonable relationship to the business of Augusta Health, and/or (b) are not required as part of a degree program.

3. **Limits when combining Augusta Health educational benefits.** While the Educational Assistance Program tuition reimbursement benefit has a calendar year annual limit of \$5,250 that is tax -free, combining this with other educational assistance reimbursement programs has up to a \$10,000 per calendar year limit for eligible team members. Other educational benefit program reimbursement opportunities include:
 - a. Participating in the Augusta Health Student Loan Repayment Assistance (SLRA). If team members are receiving funds from the Educational Assistance Program tuition reimbursement benefit combined with the SLRA benefit, amounts received cannot exceed a calendar year amount of \$10,000. Team member is responsible for paying taxes on amounts over \$5,250.
 - b. Participating in an Augusta Health educational program offering reimbursements, for example the Scholars Program. If a team member is receiving tuition reimbursement as a participant in the Educational Assistance Program benefit combined with another student educational program reimbursement, amounts received cannot exceed a calendar year amount of \$10,000. Team member is responsible for paying taxes on amounts over \$5,250.
4. A team member must secure a passing grade of “B” or better for graduate courses; a grade of "C" or better for undergraduate courses, the equivalent or obtain a certification to receive any reimbursement. Expenses must be validated by receipts and a copy of the final grade or certification received.
 - a. The types of programs a team member may benefit from under the educational assistance benefit include:
 - i. Adult education programs
 - ii. Health and hospital vocational schools and diploma programs
 - iii. Accredited colleges: associate, bachelor’s, master’s, and doctoral degree programs
 - b. For a team member to receive the benefit, the education must be related to their current job or to prepare them for future roles at Augusta Health. In addition, team members are to meet the following conditions:
 - i. Cannot be in the final step of corrective action process.
 - ii. Must have an “Effective Contributor” rating on their most current performance evaluation.
 - c. Received a grade no lower than a “B” for graduate level or a “C” for undergraduate level in the class for which reimbursement is sought (if no grade, then a certificate of completion). The educational assistance benefit is paid on a reimbursement basis.
 - d. The reimbursement will also not be paid if:
 - i. A team member ends or terminates employment with Augusta Health for any reason prior to satisfying all requirements for reimbursement.

- ii. The team member changes employment status to be less than regular part-time prior to satisfying all requirements for reimbursement.
- iii. The team member cannot be in the final step of the corrective action process.

B. Team Member Responsibilities

- C. Team members can apply for the education assistance benefit by applying through the Tuition.io portal. Learn how to access the portal and register an account by visiting the Taking Care of Us Benefit page, <https://investinginus.augustahealth.com/benefits/>.
1. Team members will receive an email notification of the application status, whether it's approved or not approved.
 2. A team member must submit a separate application for each school semester or quarter, with a course curriculum and class schedule, within 30 days prior to beginning of class.
 3. The team member is to submit the course in which they plan to enroll. If during registration a team member is unable to get the course, a request may be made to change to another comparable course (same number of hours and within the approved curriculum). These dates are necessary for Augusta Health to have enough time to approve or disapprove each course, according to hospital needs and budget. Team members will be notified whether the course is approved. If a decision is made not to approve the courses or curriculum requested, an explanation will be provided to the team member. Upon approval, the team member is to complete the Education Assistance Benefit Agreement.
 4. Team members approved for the education assistance are to submit grade reports or certificates of completion and course payment receipts to Human Resources within 30 days after the completion of the course. To be reimbursed the team member must receive at least a "B" grade for graduate level courses or a "C" grade for an undergraduate level course.
 5. The team member will be issued education assistance reimbursement funds through their payroll check. All documents regarding the request, approval, and payment for reimbursement will be maintained by Human Resources.
 6. Augusta Health is making a special investment in a team member by providing the tuition reimbursement benefit. Team member is required to work one quarter (three months) in their status for every amount up to \$1,250 they receive in tuition reimbursement. The team member is required to work one quarter (three months) in their status, starting upon date of receipt of the money.
 - a. The time must be worked in an eligible status (Full-time or Part-time) as when the tuition reimbursement was received.

- b. If a team member ends or terminates employment with Augusta Health for any reason prior to fulfilling this requirement, the team member is to refund the full amount of tuition reimbursement received to Augusta Health.
- c. All refunds due to Augusta Health are to be paid in full on or before the team member's final paycheck. Augusta Health may deduct from a team member's final paycheck including any accrued time off bank to the extent permitted by law any sums owed by the team member to Augusta Health.

D. Leader Responsibilities

1. The department director is responsible for a timely response to all entered applications. The team member must meet eligibility, as outlined in this policy. Other considering factors are as follows:
 - a. Relevance of program to current job and/or other jobs of value to Augusta Health
 - b. The ability to balance staffing and work schedules with the requested class schedule.
 - c. The organization's financial ability to pay (budget) and needs.
 - d. Cannot be in the final step of the corrective action process and have a rating of "Effective Contributor" or higher on their most recent performance evaluation.

6. Appeals Process

- Team Members may appeal a rejected submission request by emailing HumanResources@augustahealth.com within two weeks of the email rejection notification and should include:
 - a. Email subject line: Tuition/Professional Certification Appeal
 - b. Explanation of how requested course or credentialing certification applies to current role or future ambitions at Augusta.
 - c. A copy of the curriculum, activities for course, and credentialing requested.
 - d. Any additional supporting documentation related to your request.
 - e. A decision for appeal will be provided within 10 days following receipt of appeal.

7. Related Policies and Documents: N/A

8. References

- Educational Assistance Benefit Agreement
- Educational Assistance Application

9. Revision Notes

Notes
10/27/2021 Updated to new format. 1/1/2022 - Revised to Education Assistance Program. 12/6/2023 – Eligibility date is date of hire. Clarification on taxation. 4/29/2024 – Updated to new process with Tuition.io.

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