

POLICY TITLE: Employee Education Plan	
APPLICABLE FACILITIES:	
<input checked="" type="checkbox"/> EHC	<input checked="" type="checkbox"/> EDH
<input checked="" type="checkbox"/> EHH	<input checked="" type="checkbox"/> EHI
<input checked="" type="checkbox"/> EHN	<input checked="" type="checkbox"/> EJCH
<input checked="" type="checkbox"/> ELTAC	<input checked="" type="checkbox"/> ESJH
<input checked="" type="checkbox"/> EUH	<input checked="" type="checkbox"/> EUHM
<input checked="" type="checkbox"/> EUHS	<input checked="" type="checkbox"/> EUOSH
<input checked="" type="checkbox"/> EWWH	<input checked="" type="checkbox"/> RJV-ERH
<input checked="" type="checkbox"/> RJV-ESOP	<input checked="" type="checkbox"/> TEC/ESA
EFFECTIVE DATE: 07/07/2021	ORIGINATION DATE: 03/10/2010

SCOPE:

Applicable to all Emory Healthcare employees who are eligible for the Employee Education Plan.

PURPOSE:

Emory Healthcare encourages employees to take advantage of all opportunities that will assist them in the development of their job-related skills and, in turn, enhance their job proficiency. In order to endorse and facilitate such skills development, Emory Healthcare provides an Employee Education Plan to eligible employees for enrollment in degree-seeking programs that are job-related and fill an identified Emory Healthcare need.

POLICY STATEMENT:

Eligibility

Regular full-time employees who are scheduled to work at least thirty-six (36) hours per week and part-time employees who work at least twenty (20) scheduled hours per week are eligible to participate in the Employee Education Plan after satisfying the appropriate waiting period. Regular full-time and part-time employees are eligible after a one-year waiting period for undergraduate program reimbursement and after a two-year waiting period for graduate program reimbursement. No Doctorate Degrees are reimbursable with the exception of the Doctorate of Pharmacy (PharmD), Doctorate of Physical Therapy (DpT) and effective March 16, 2020, the Doctorate of Nursing Science (PhD) and the Doctorate of Nursing Practice (DNP) with the approval of the Emory Healthcare Chief Nursing Officer. The Doctorate of Nursing Practice has a six year waiting period requirement. Each eligible employee may begin participation at the beginning of the applicable institutional academic session following the date of eligibility. Eligible employees may only receive one (1) undergraduate and one (1) graduate level degree through the Employee Education Plan. At no time may an eligible employee receive reimbursement for multiple graduate and undergraduate level degrees, such as being reimbursed for two (2) graduate-level degrees or two (2) undergraduate-level degrees.

Effective July 1, 2015, tuition paid towards an Associate Degree in nursing will not be reimbursed. Employees enrolled in an Associate Degree program in Nursing and receiving tuition reimbursement prior to such date will be eligible for continued tuition reimbursement until completion of such Associate Degree in nursing program.

Effective August 26, 2018, ESA employees may begin participating in the Employee Education Plan. Effective September 9th, 2018, Emory Healthcare will provide continued educational development of "grandfathered" eligible DeKalb Medical employees. Grandfathered eligible employees are provided assistance with tuition costs and required textbooks for education in degree-seeking programs and/or professional certification costs that are job-related or fill a healthcare-related need as stated in Appendix B.

Employees must have a “Fully Meets Expectations” PA rating on their most recent Performance Advantage Review, including Mid-Year Review. The rating of “Fully Meets Expectations” must also be maintained throughout the employee’s participation in the program. If the rating drops below “Fully Meets Expectations,” the participant will be given a grace period in which to bring his or her rating to the minimum. If the participant is unable to do so by the end of the grace period or until his or her next PA review, the employee will be unable to continue in the Employee Education Plan. The employment status at the end of the course determines the total eligible reimbursement and rate. Except as otherwise stated below, employees must be in an active status in order to receive reimbursement for the course. Eligibility for Employee Education Plan shall cease during any period in which the employee is on leave of absence, excluding FMLA and worker's compensation. However, employees who are already taking a course when the leave of absence begins, or due to a change in Employer from Emory Healthcare to an entity controlled directly or indirectly by Emory Healthcare, will be eligible for the reimbursement of tuition costs upon completion of that course. Courses that begin after the leave begins are not eligible for reimbursement.

Programs of Study

All courses taken under the Employee Education Plan must be for academic credit in a degree-seeking program and directly related to the employee's current job and leads to a job that is an identified need within Emory Healthcare. The school must be accredited by a recognized regional accrediting organization. Accreditation is a national system of monitoring the quality of the credits received from an institution of higher education. Emory Healthcare approved accreditation agencies are: Middle States Commission on Higher Education, New England Association of Schools and Colleges Commission on Institutions of Higher Education, Higher Learning Commission, Northwest Commission on Colleges and Universities; Southern Association of Colleges and Schools Commission on Colleges, and WASC Senior College and University Commission. Employees are responsible for confirming the school they are planning to attend is an eligible accredited institution that Emory Healthcare accepts. To confirm if a school is accredited, employees can visit The Council for Higher Education at www.chea.org. Emory Healthcare has the right to audit attestations of accreditation and revoke benefit if ineligible.

Reimbursement Amounts

Regular full-time employees are eligible to be reimbursed 80% of tuition costs paid of up to eighteen (18) credit hours per calendar year. In no case will the employee be reimbursed more than the actual tuition fees paid. Reimbursement will have a capped amount of \$7,500 per calendar year for graduate program courses and \$5,250 per calendar year for undergraduate program courses. Part-time employees are eligible to be reimbursed at 40% of their tuition costs for up to eighteen (18) credit hours, paid up to \$3,750 per calendar year for Graduate programs and \$2,625 per calendar year for Undergraduate programs. Reimbursement amounts will be applied to the calendar year in which they are processed. (Example: If a participant submits documentation for reimbursement in December 2019, but the reimbursement payment is not processed until mid-January 2020, the reimbursement payment will count toward the calendar year 2020’s reimbursement allotment). Notwithstanding the foregoing, benefits eligible Registered Nurses who are employed by Emory Healthcare prior to September 1, 2014 and who are seeking a BSN degree are eligible to be reimbursed as described above for more than eighteen (18) credit hours per calendar year.

Costs for books, fees, tools, equipment, activities, supplies, meals, lodging, transportation and other miscellaneous expenses related to taking a course are not reimbursable. Certifications and degree

pre-requisites are not eligible for reimbursement. Scholarships, Discounts, HOPE, Pell, and Grant payments are not eligible and may be subjected to a reduction in reimbursement. Notwithstanding the foregoing, benefits eligible Registered Nurses who are employed by Emory Healthcare prior to September 1, 2014 and who are seeking a BSN degree are eligible to be reimbursed for any applicable pre-requisites for such BSN degree.

Reimbursement Requirement

Eligible employees must earn credit hours toward a degree and a grade of "C" or above, or a passing grade in a pass/fail system with credits earned to receive reimbursement for the tuition costs paid for the course taken.

Application Procedures

- Online reimbursement applications must be submitted prior to the first day of class.
- The employee must first obtain approval from his or her manager and discuss specific career goals within Emory Healthcare and provide an explanation of how this degree would benefit Emory Healthcare.
- The employee can then submit the Employee Education Plan application online through self-service.
- The employee's manager must approve the online Employee Education Plan application. This approval indicates verification that the employee's attendance at classes will not adversely affect departmental services, the most recent Performance Ratings is at least a "Fully Meets Expectations" and that the degree is job related and fills an identified need within Emory Healthcare.

Appeals

Additional approval may be deemed appropriate by the program administrator. If necessary, review and final approval or disapproval of the online application will be determined by the Emory Healthcare Employee Education Plan Committee (the "Committee"). The role of the Committee includes, but is not limited to (1) review and approval of current and new degree requests; (2) review and ensure adherence to policy and procedures; and (3) review appeals. The Committee will review the program degrees annually to ensure market competitiveness and alignment with Emory Healthcare strategic goals. If an employee wishes to appeal the committee's determinate, the employee may send a written appeal request to the Chief Human Resources Officer.

Program Amendment or Termination

Emory Healthcare retains the rights at all times to amend or terminate all or any portion of this program as determined and approved by the Committee.

Requirements for Reimbursement

No later than thirty (30) days following the completion of the course/semester, the employee must attach his or her application with the following: (1) the original school-provided grade report with letter grade and number of credits earned; and (2) the original paid tuition receipt itemized showing tuition charge, what was paid and the method of payment. Employees should keep copies of everything submitted and maintain records of their credits and dollar amounts reimbursed. Any falsification or misrepresentation of information will result in the denial of reimbursement and may be grounds for

appropriate disciplinary action. Except as otherwise stated herein, Education Plan reimbursements are applied to an employee's paycheck, approximately within 30 business days after receipt of application, grades, and receipts. Eligibility for the Employee Education Plan shall cease when an employee separates from employment or changes status to a non-benefits eligible position. Employees who are already taking a course at the time of separation will not be eligible for the reimbursement of tuition costs for that course. Notwithstanding the foregoing, time spent in a non-benefit eligible position shall count towards the work commitment for purposes of Section J.

Income Tax Information

The taxability of the tuition reimbursement is determined by federal regulations and is subject to change. Per IRS guidelines, employer-provided educational assistance benefit is tax-free up to \$5,250. Amounts above that are taxable and are added to the employee's taxable wages. All applicable taxes are withheld from the employee's paycheck.

Work Commitment

The work commitment period begins once an employee completes his or her degree, calculated from the employee's last reimbursement. The work commitment is one year in the same position (or a position approved by the Committee) for Undergraduate degrees and two years for Graduate degrees. If an employee voluntarily terminates employment prior to satisfying the work commitment, the employee, or former employee, agrees to reimburse Emory Healthcare the sum of the reimbursement received by such employee, not to exceed \$5,000. If authorized, Emory Healthcare can deduct this amount from final paycheck and, if applicable, the Comprehensive Leave payout checks. If Emory Healthcare takes legal action to obtain such reimbursement, the employee will be responsible for any and all associated legal fees and costs, including attorney fees. Notwithstanding the foregoing, if after finishing a course covered under this policy an employee moves into a position at Emory Healthcare, an entity controlled directly or indirectly by Emory Healthcare, or an entity in which Emory Healthcare is a member or partner, that is ineligible for benefits prior to satisfying the work commitment, such service in that new active status position shall count towards satisfying the work commitment detailed above. If an employee is rehired after such 30 day period, such service in that new position shall not count towards satisfying the work commitment detailed above.

Direct Payment

For certain educational programs at certain institutions, Emory Healthcare may, in its sole discretion, make a payment directly to an educational institution rather than require an employee to make such payment and then seek reimbursement. Such payment shall be made at the completion of the course, in accordance with this Policy, including, but not limited to, the requirements in Section C. above. If a direct payment is made, such institution, shall provide Emory Healthcare with the student's (a) original school-provided grade report with letter grade and number of credits earned; and the original paid tuition receipt itemized showing tuition charge, what was paid and the method of payment, and the employee will not have to provide this in accordance with Section H above.

CONSEQUENCES OF NON-COMPLIANCE:

- Administrative
- Departmental

RELATED DOCUMENTS AND LINKS:

N/A

DEFINITIONS:

N/A

REFERENCES AND SOURCES OF EVIDENCE:

N/A