



Manual: Human Resources

Section: Benefits

Number: HR201v5

Policy  Procedure

Title: Education Reimbursement Program

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HR Strategy Team	07/29/22						
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<p><b>Executive Management Team Member:</b> Mark Steiman, Vice President Human Resources</p> <p><input type="checkbox"/> New <input checked="" type="checkbox"/> Revised <input type="checkbox"/> Reviewed (no changes) Track: <input type="checkbox"/> A <input checked="" type="checkbox"/> C <b>Replaces:</b> 12/06, 04/07, 01/13, 06/18, 09/19, 08/22</p>	<p><b>Medical Executive Committee Approval Date:</b></p> <p><b>Board of Directors Approval Date:</b></p> <p><b>Effective Date:</b> 08/05/22</p>						

**I. PURPOSE:**

- A.** The Education Reimbursement Program offers financial assistance to eligible associates pursuing voluntary self-development through continuing education. CHOC encourages and assists its associates in advancing their professional skills and knowledge in areas that will contribute to the improvement of their present job functions and/or potential advancement.
- B.** All Regular Full-Time, and Part-Time, associates are eligible to participate in the programs offered so long as they
  - 1. Are in Good Standing (as defined in HR603 Good Standing) at the time of application
  - 2. Have been continuously employed at CHOC for at least ninety (90) calendar days.
  - 3. Be classified as a Regular Full Time or Part Time associate throughout the submission, approval and reimbursement process. Associates on a Leave of Absence (LOA) are not eligible to participate in the programs until they have returned to work.

**II. POLICY:**

**A. Education Reimbursement**

- 1. **Qualifying Programs**– Education Reimbursement will be provided for the following qualifying programs:
  - a. College courses contributing to an accredited degree, diploma, or certificate. To qualify for a certificate program, the certificate must be from an accredited organization that requires the successful passing of multiple courses that result in the participant being certified in a particular subject. The program should entail completion of at least 10 courses over a 12 – 18-month period of time. Programs which are part of a non-degree, non-accredited organization providing

<b>Manual:</b> Human Resources	<b>Number:</b> HR201v5
<b>Section:</b> Benefits	<b>Title:</b> Education Reimbursement Program

- a document of completion (typically in certificate format) but not a license or subject certification at the conclusion of the program are not eligible for reimbursement.
- b. Professional certifications awarded by a state or national professional organization/board who is responsible for granting initial certification and reviewing recertification on a regular basis, typically after with successful passing of a formal exam for specialty skills over and above the license, certification, or registration, if any, required for the associate's current position.
  - c. College preparatory courses providing training for a certification over and above a required certification, and provided the course carries a letter grade or pass/fail designation.
2. **Qualifying Reimbursable Expenses** –The following items will qualify as reimbursable expenses in accordance with IRS regulations:
- a. Tuition
  - b. Application and fee(s) for initial certification exams
  - c. Required books for college or preparatory courses
  - d. Preparatory materials for certification exams
  - e. Recertification expenses, for each period of recertification.
  - f. New license and licensing fees (Examples include: Licensed Clinical Social Worker LCSW or Psychology License), if the license is not required for the associate's current role
  - g. Continuing Education (CE) courses only if resulting in license or certification renewal
3. **Maximums** – Associates are eligible for Education Reimbursement in accordance with the amounts listed in Appendix A and may be taxable according to IRS regulations.
4. **Pre-Approval Process** –
- a. Associates are to use their Single Sign-On (SSO) credentials to log in to the online Education Reimbursement website, with Tuition.io
  - b. Associates must complete one application per course or certification exam. Applications submitted for more than one course or exam will be rejected. Associates attending Universities which charge a flat rate per semester (flex programs) must submit one application per course.
  - c. Applications will be accepted between thirty (30) calendar days and seven (7) calendar days before the exam date or course start date. The system will automatically deny applications submitted more than thirty (30) calendar days or less than seven (7) calendar days before the course or exam start date.

<b>Manual:</b> Human Resources	<b>Number:</b> HR201v5
<b>Section:</b> Benefits	<b>Title:</b> Education Reimbursement Program

- d. Once the application is submitted in the Tuition.io website portal, it will be reviewed by Tuition.io for approval. Once complete, the associate will receive an email notification regarding the status of the application.

5. **Reimbursement –**

- a. Once the course or exam is complete and the associate is informed of the letter grade or “pass” designation, the associate has sixty (60) calendar days to submit all required follow-up documentation by uploading it to the application in in Tuition.io website portal. Once the sixty (60) calendar days have expired, the window to submit documentation will have expired and the associate will not receive reimbursement of their education expenses. Following are the items required for reimbursement:
  - 1) A copy of the catalog or webpage that lists tuition costs (i.e., cost per unit) and required books, or for a certification exam, the exam costs and application fee.
  - 2) A receipt from the college, university, or certifying board that clearly lists the method of payment, item(s) paid for (tuition or exam fees), associate’s full name and amount paid. All required information for proof of payment receipt must be submitted on one document. Multiple documents will not be accepted.
  - 3) Receipts for required books or study materials that clearly list the method of payment, item(s) paid for, associate’s full name and amount paid. All required information for proof of payment must be submitted on one document. Multiple documents will not be accepted.
  - 4) Copies of final transcripts or other official notification showing the passing letter grade achieved or “pass” designation, a copy of the certificate/certification, and/or a copy of exam results.
- b. Once all documents have been uploaded to the application submitted in the Tuition.io website portal, Tuition.io will review and process each application.
- c. Once approved, reimbursement will be processed in the associate’s paycheck within two pay periods following the approval by Tuition.io. If rejected, associate will receive an email notification explaining the reason for non-payment.

6. **Program Provisions--**

- a. This benefit may be taxable according to legal requirements.
- b. Separation of employment (voluntary or involuntary) or a termination event with a future date entered into Workday

<b>Manual:</b> Human Resources	<b>Number:</b> HR201v5
<b>Section:</b> Benefits	<b>Title:</b> Education Reimbursement Program

- before a reimbursement is made will result in non-payment, even if reimbursement is approved.
- c. Associates will not be reimbursed for any amount covered by any form of financial aid, such as scholarships, grants, physician donations, or Veterans Administration Benefit Programs.
  - d. Education reimbursement will only be paid upon verification of the associate having received a grade of “C” or better, or “Pass” if Pass/Fail is how the course is offered. Reimbursement of professional certifications is paid upon proof of successful completion of the certification exam.
  - e. Activity related to an education program is not considered hours worked, should be done on an associate’s personal time, and should not interfere with an associate’s job duties.
  - f. Preparatory courses for certification exams must be submitted for payment with the initial certification application and will not be reimbursed separately.
  - g. Continuing Education courses for recertification must be submitted for payment with the recertification at the time of renewal and will not be reimbursed separately.
  - h. Costs for voluntary attendance at seminars, workshops, lectures and single, unrelated academic courses are not reimbursable under this program but may be covered in specific department budgets.
  - i. Education Reimbursement program will not pay for any additional fees incurred by associate (including late fees).
  - j. Education Reimbursement is provided according to this policy only to the extent that budget funds are available.
  - k. Applications submitted using false or fraudulent information will be automatically rejected, and associate will be subject to corrective action up to and including termination.
7. **Examples of Reimbursable Courses/Certifications** – The following table lists examples of classes and certifications that are and are not covered under the Education Reimbursement program:

<b>Manual:</b> Human Resources	<b>Number:</b> HR201v5
<b>Section:</b> Benefits	<b>Title:</b> Education Reimbursement Program

Examples of courses and certification that <u>are</u> covered under the Education Reimbursement Program	Examples of courses and certifications that <u>are not</u> covered under the Education Reimbursement Program
Courses toward a BSN from a nationally accredited college or university, when a BSN is not required for the job.	A seminar in Conflict Management. One-day courses, seminars, webinars, Continuing Education (CE) courses not leading to recertification and workshops would fall under each department's individual budget.
A certification in Sensory Integration for a Physical Therapist, when it is not a required certification for the position but relates to the associate's current job or advancement and comes from a nationally accredited, recognized, certifying board.	RN license renewal, when licensure is required for the job. Required licenses or certifications are not eligible.

REVISION HISTORY			
Number	Date	Author	Revision / Updates
HR201v5	07/27/2022	K Wilkinson	Update document to remove student loan repayment Change TuitionManager to Tuition.io website and requirements for reimbursement for the new program Update types of associates covered for tuition reimbursement

Appendix A

<b>Annual Education Reimbursement Maximum</b>	<b>Lifetime Education Reimbursement Maximum</b>
\$10,000 per calendar year	Unlimited
<b>Non-Taxable Education Reimbursement</b>	<b>Taxable Education Reimbursement</b>
First \$5,250 received in Education Reimbursement is paid tax-free	Any additional amount of Education Reimbursement received over \$5,250 is taxed at the higher, supplemental rate in accordance with IRS regulations

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### Summary of Changes/Updates:

Deleted "and Contribution" from title and throughout policy  
Update TuitionManager to Wiley Beyond throughout policy  
I. Purpose  
A. Deleted "as well as those that have qualifying student loan debt." Deleted "The Education Reimbursement and Contribution Program includes Education Reimbursement and Student Loan Repayment" Deleted "and Per Diem"  
I.B.1. Replaced "HR193- Recruitment with HR603 Good Standing"  
I.B. Added "and (3) be classified as a Regular Full Time or Part Time associate throughout the submission, approval and reimbursement process"  
Deleted "Per Diem associates are eligible to participate in the program as long as they have hours worked within the last 30 days prior to education reimbursement and student loan repayments." Add "Associates on a Leave of Absence (LOA) are not eligible to participate in the programs until they have returned to work."  
II.A.1.a. added "To qualify for a certificate program, the certificate must be from an accredited organization that requires the successful passing of certified in a particular subject. The program should entail completion of at least 10 courses over a 12-18 month period of time. Programs which are part of a non-degree Non-accredited organization providing a document of completion (typically in certificate format) but not a license or subject certification at the conclusion of the program are not eligible for

reimbursement.”

II.A.1.b. Added “/board who is responsible for granting initial certification and recertification on a regular basis, with successful passing of a formal exam”

II.A.2.b. Added “ and” fees for “initial”

II.A.2.e. Deleted “but only up to the amount of the initial application fee.

II.A.2.f. Added “New license and licensing fees (Examples include: Licensed Clinical Social Worker LCSW or Psychology License) if the license is not required for the associate’s current role.

II.A.2.g. Added “ Continuing Education (CE) courses only if resulting in license or certification renewal”

II.A.4.b. Added “Associates attending Universities which charge a flat rate per semester (flex programs) must submit one application per course.

II.A.4.d. Changed “it is sent to the supervisor for pre approval If pre - approved, it will be submitted to the Human Resource Department” to in the Wiley Beyond website portal, it will be reviewed by Wiley Beyond. Deleted “ final review and” approval.

II.A.5.a. Added “Once the sixty (60) calendar days have expired, the window to submit documentation will have expired and the associate will not receive reimbursement of their education expenses.

II.A.5.a.2) Added “associate’s full name and amount paid. All required information for proof of payment must be submitted on one document. Multiple documents will not be accepted.”

II.A.5.a.3) Added “associate’s full name, and” “All required information for proof of payment must be submitted on one document. Multiple documents will not be accepted.”

II.A.5.a.4.) Added “final”

II.A.5.b. Added “Submitted” Changed “in Tuition Manager in the Wiley Beyond website portal,” “Human Resources to Wiley Beyond”

II.A.5.c. Deleted “will be processed” Added “will be split into two equal parts; the first half will be processed in the associate’s paycheck within two pay periods following the approval by Wiley Beyond and the second half will be paid in the paycheck after six months following the first reimbursement.” Deleted “on the associate’s paycheck within two pay periods following the approval by the Human Resources Department.

II.A.6.b. Remove “The associate must be employed by CHOC Children’s as of the date on which each reimbursement payment is made to receive such payment.” Added “or a termination event with a future date entered in Workday”

II.A.6.f. Added “Preparatory courses for certification exams must be submitted for payment with the initial certification application and will not be reimbursed separately.”

II.A.6.g. Added “Continuing Education courses for recertification must be submitted for payment with the recertification at the time of renewal and will not be reimbursed separately.”

II.A.6.j. Education Reimbursement program will not pay for any additional fees incurred by associate (including late fees).

7. Added “webinars, Continuing Education (CE) courses not leading to recertification”

II.B. Deleted entire section “Student Loan Repayment 1. Eligibility- CHOC Children’s has partnered with SoFi to administer the Student Loan Repayment component of the Education Assistance Program. SoFi will coordinate payment on behalf of an associate if the following criteria are met.

a. The associate makes at least the minimum required monthly payment for the loan, exclusive of payments made by CHOC Children’s through SoFi” b.

The loan is not in deferment or forbearance. c. the loan is issued by a U.S. based financial institution. d. The loan is affiliated with a U.S based school.

2.Student Loan Repayment Process- Associates are required to register their loan with SoFi by following the steps below: a. SoFi will email all eligible associates inviting them to enroll in the Employer Contribution Program. B. An associate must complete enrollment to be eligible to receive payment. c.

Once approved, CHOC (through SoFi) will contribute a monthly payment directly to the student loan provider for the loan identified (refer to Appendix A for contribution amounts) 3. Student Loan Repayment Provisions a. This



benefit may be taxable according to legal requirements. B. The associate must be employed by CHOC at the time of payment to receive the contribution. Separation of employment (Voluntary or involuntary) before a contribution is made will result in nonpayment. c. If an associate fails to make a minimum monthly payment, he/she will not be eligible to receive a contribution.

Appendix A Deleted "Monthly Employer Contribution and Lifetime Employer Contribution Maximum" "\$100 per month and unlimited"

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