



<b>Service Area:</b> Human Resources	<b>YALE NEW HAVEN HEALTH POLICIES &amp; PROCEDURES</b>	
<b>Title:</b> Tuition Assistance		
<b>Date Approved:</b> 12/21/2015, 01/08/2018, 01/01/2020	<b>Approved by:</b> System Operating Committee	
<b>Date Effective:</b> 01/01/2016, 01/01/2018, 01/01/2020	<b>Date Reviewed/Revised:</b> 11/01/2017, 12/23/2019	
<b>Distribution:</b> HR policy standardization update to YNHHS managers. Additional Communication by respective HR teams to managers. MCN policy manager.	<b>Policy Type (I or II):</b> Type I	
<b>Supersedes:</b> Tuition Reimbursement (BH F9), Tuition Reimbursement (GH F7), Tuition Assistance (HSC II.C.6), Tuition Assistance (NEMG F10), Tuition Assistance (Grimes Center E:1), Tuition Assistance (YNHH E:1)		

## PURPOSE

- A. To support employee growth and development by increasing job opportunities or supporting future success in their current position.
- B. To help defray the costs of higher education for eligible employees.
- C. To monitor the quality of educational pursuits of employees through review and approval of programs by the Human Resources department.

## APPLICABILITY

This policy shall apply to the Yale New Haven Health System (YNHHS), its parent and subsidiary corporations, including but not limited to its Delivery Network hospitals (Bridgeport Hospital, Greenwich Hospital, Westerly Hospital, and Yale New Haven Hospital), Northeast Medical Group, Yale New Haven Care Continuum (d/b/a Grimes Center), Corporate Professional Business Services (CPBS), and each of their respective parent and subsidiary corporations, and each affiliated entity owned by or under common ownership and control with any of the foregoing, with the exception of Lawrence + Memorial Hospital and VNA of Southeastern Connecticut.

This policy is applicable except where it is expressly superseded by collective bargaining agreements.

## Tuition Assistance

### **POLICY**

It is the policy of the Yale New Haven Health System to encourage eligible employees to obtain additional education on their own time from a regionally or nationally accredited college, university, business or trade school.

### **PROCEDURE**

#### A. Administrative guidelines

##### 1. Eligibility

- a. Regular benefits-eligible full-time and part-time employees. Employees are eligible immediately, however, courses must start on or after their hire date.
- b. An employee will be ineligible to participate in instances where the employee's most recent overall performance evaluation was "Not Demonstrated" except where course work is recommended by the employee's manager and is intended to attain a specific improvement in performance.

##### 2. Field of study

- a. Individual job-related courses for which college credits accrue and are not part of a degree program.
- b. All individual courses and courses related to an Associate, Bachelor, or Master degree must be provided by an institution holding Regional or National accreditation recognized by the U.S. Department of Education. School accreditation can be verified via the U.S. Department of Education's Office of Post-secondary Education (OPE) website.

Courses must meet the following criteria:

- Successful completion of the course or program is likely to improve the employee's effectiveness in performing his/her current duties; or
- Relate directly to the pursuit of another position within the Health System to which the employee may reasonably aspire; or
- Provides training that could prepare the employee for additional responsibility, or promotion or transfer, should such opportunities occur.

## Tuition Assistance

### c. Certificate Programs

Only the following job-required certificate programs are covered under Tuition Assistance and they must be taken at a regionally or nationally accredited school:

Biomedical Engineering	LPN
Business Office Technology	Medical Assistant
Central Sterile Supply Tech.	Medical Lab Technician
Certified Nurse Assistant	Medical Coding/Billing
Computer Science	Paralegal
Corporate Compliance	Pharmacy Technician
Culinary Arts	Plumbing
Electrical Engineering	Surgical Technology
HVAC	Welding

- d. Certain doctoral and other advanced degree programs including, PharmD, DNP, APRN, NP, DPT and DOT are covered by tuition assistance. Other doctoral degrees, including Ph.D. will be treated as an exception and must be approved both by the appropriate department head and the Human Resources department.
- e. College Level Examination Program (CLEP) and Challenge Exams offering credit may be approved. Each exam will count as one (1) course.

### 3. Courses not covered include:

- a. Certifications and designations
- b. Courses that are the professional responsibility of employees to maintain licensure or certification.
- c. Workshops, seminars and conferences which offer Continuing Education Units (CEUs).
- d. Courses not approved by the employee's department and/or Human Resources.
- e. GED and high school courses.

### 4. Scheduling

Courses of study must be taken during hours outside of an employee's paid work time. Based on the operational and staffing needs of the department, an employee's scheduled hours of work may be arranged to accommodate the employee's needs.

## B. Administrative procedure

### 1. Application procedure for all participants

## Tuition Assistance

To be eligible to receive tuition assistance, an employee must submit a course approval application for each quarter, semester or academic term. The employee should begin the process 30 days prior to registering for his/her course(s). Applications must be submitted no later than 30 days after the course start date. Applications will not be accepted if submitted more than 30 days after the course start date. Applications will be reviewed for policy compliance by the program administrator before forwarding the application to the employee's immediate manager for final approval. Subsequent applications within the same program, degree or field of study will not need manager approval.

### 2. Reimbursement procedure for all participants

Upon application approval, the employee is responsible to make all required payments directly to his/her school and will be reimbursed for eligible expenses upon successful course completion. The employee is responsible for submitting proof of successful course completion (grades) and an itemized statement of tuition and fees and proof of payment within 60 days after course completion in order to receive reimbursement. All documentation must have the employee's name and the school's name pre-printed on them. All documentation must be submitted to your approved application within the Bright Horizons EdAssist Solutions site.

### 3. Deferred Payment Letter

Employees whose schools will accept a deferred payment for their course(s) may request an eligibility verification letter from Bright Horizons EdAssist Solutions which can be provided to the employee's school in support of the request for deferral. Please note that such an agreement is between the employee and the school. The employee must still show proof of accepted deferral with the provider for his/her course(s) in order to receive a reimbursement from the Program

### 4. Grades required for reimbursement:

All individual courses and courses related to an undergraduate degree or certificate program must be completed with a minimum grade equivalent of *C-* or better. All courses related to a graduate degree must be completed with a minimum grade equivalent of *B-* or better. Courses that are based on a pass/fail grading system must be completed with a grade of "pass". Courses in which an employee receives an incomplete, withdrawal, or insufficient grade are ineligible.

### 5. Direct Bill program

#### a. Covered Programs

The Direct Bill program was developed to provide direct tuition payments to accredited educational programs for employees enrolled in one of the following Fields of Study:

- Nursing: Bachelor of Science Degree in Nursing (BSN)

## Tuition Assistance

- Radiology: Associates or Bachelor of Science Degree in Radiology (diagnostic imaging, ultrasound, nuclear medicine, radiation therapy)
- Respiratory Therapy: Associates or Bachelor of Science Degree in Respiratory Therapy
- MRI or CT Certificate program
- Pharmacy Technician Training Program: certificate program accredited by The American Society of Health System Pharmacists (ASHP)

### b. Process

With pre-pay direct payment to your school, Bright Horizons EdAssist Solutions will pay your school directly via check once an invoice is received. Once the course is approved, you must print and deliver the Bright Horizons Letter of Credit (LOC) to your school. Per the instructions on the LOC, your school will email an invoice to Bright Horizons at which point Bright Horizons will pay the school directly.

Employees in this program are required to upload their official course grade document after the course ends. Failure to submit the required documents within the designated timeframe or to obtain the minimum grade required for successful completion of the course (see page 4) will result in a default under the tuition assistance program, which will require the employee to repay all of the eligible tuition program funds through payroll deduction. When registering for a Direct Bill Program course, employees will be required to sign an authorization to allow the tuition monies paid in advance to be deducted from their paycheck if they default on the program. Employees who are in default under this program will receive a letter advising them when the payroll deductions will begin and the per paycheck deduction amount. Failure to sign such an authorization when required will disqualify the employee from participating in the Direct Bill program. The employee will still be eligible for the traditional tuition assistance program.

## Tuition Assistance

## C. Tuition Assistance facts

1. Tuition and eligible fees will be covered up to the annual calendar year benefit amount stated below. Payment amounts are applied to the annual benefit year based on course end date.

Education Program	Eligibility Criteria	Annual Benefit Amount
Associate's Degree Bachelor's Degree Master's Degree Approved Doctorate Degree or Post-Master's Certificate	Includes all courses taken as part of an approved degree program, as well as prior learning assessments and tests used to document knowledge for the purpose of granting credit toward an approved degree (e.g. - CLEP, ACE, DANTES).	Full-time: \$5,200 Part-time: \$3,500
Certificate	Includes all courses required to complete an approved Certificate program. Certificate programs must have a measurable completion requirement beyond attendance and participation.	
Individual Courses	Each course must be directly related to an employee's current position or career path that aligns with YNHHS' business needs.	

2. Payment will be based on the employee's status (full-time, part-time) at the time of payment processing.

3. Expenses:

Eligible: Tuition and fees that are directly related to a course (e.g. lab, registration, and technology fees).

Ineligible: All other expenses and fees (e.g. matriculation, library, student service, graduation, and parking/transit fees, as well as finance charges/late payment fees and books).

4. Tuition assistance amounts are applied to the annual benefit year based on the course end date. For example, the course ends on 12/16/18 and is submitted on 1/10/19 for tuition assistance. The amount paid will be based on the balance remaining in 2018 since that is the year the course ended.
5. Employees must certify that they have **not** received assistance from any other source, such as scholarships, grants (e.g. a Pell grant, etc.). Such payments will be applied to eligible expenses first prior to calculating your tuition assistance from the YNHHS Program. Financial aid received in the form of student loans will not be deducted.

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6. Payment will not be made if an employee has terminated. Employees must be active and on payroll at the time of reimbursement.
7. In compliance with IRS regulations (section 127), employer provided educational assistance is exempt from taxation up to a maximum of \$5,250.00 per calendar year. Taxes will be assessed if, at the time of payment processing, the total amount of tuition assistance paid in the calendar year exceeds \$5,250. Please consult with your tax advisor for additional information.

### **REFERENCES**

N/A

### **RELATED POLICIES**

N/A