



Tuition Assistance PGR

Approved: 03/02/2016

Review: 12/01/2017

Name of Associated Policy: [Tuition Assistance Policy](#)

DEFINITIONS: Funds paid to accredited universities/colleges that result in a formal degree or an approved certificate.

RESPONSIBLE POSITIONS (TITLE):

- All Palmetto Health Team Members

PROCEDURE STEPS, GUIDELINES, OR REFERENCE

1. Palmetto Health is offering the Tuition Assistance Plan as a benefit to its employees under Section 127 of the Internal Revenue Code. This statement serves as the employee's notice of the existence of the plan and its availability and benefits.
2. Irrespective of other grants and scholarships received, full-time employees (status codes 05, 18, 21, 24) may apply for tuition assistance up to \$5,000 per calendar year after 90 days continuous employment. Part-time employees (status codes 03, 04, 22, 23) may apply for tuition assistance up to \$2,500 per calendar year after 90 days continuous employment. **Employees may apply for tuition assistance for tuition and book expenses only.** INTERNS, GRADUATE ASSISTANTS, AND RESIDENTS ARE NOT ELIGIBLE FOR TUITION ASSISTANCE. EMPLOYEES ON LEAVE WILL BE GOVERNED BY BENEFIT ELIGIBILITY FOR TYPE OF LEAVE.
3. Directors should use the following criteria as a guide to make recommendations for approval for any tuition assistance application:
 - a) employee is in good standing with no disciplinary action within the last 12 months and;
 - b) degree is aligned with a critical staffing need role for Palmetto Health as determined by Human Resources at least annually; or
 - c) degree is necessary for increased responsibilities in the current position as documented in the job description or other sources provided by department director and above; or
 - d) employee is participating in leadership development programs as documented by the Corporate Learning Officer.
4. In addition to using criteria in item 3 for recommending approval, master's degree application must have signatures of the director and vice president/executive for the discipline. Doctoral degrees will be reviewed by the Tuition Assistance Committee

which includes members of the Executive Cabinet. The employee will be notified of the committee's final decision.

Tuition assistance applications for certificate, GED, associate or bachelor degrees MUST be submitted at least (30) days prior to course(s) start via the PERKS online system. If submitting applications for a Masters degree and above for the first time, the Tuition Assistance application MUST be submitted at least (45) days before course(s) start otherwise the 30 day rule applies.

5. Employees who have prior approval for tuition assistance and are continuing the process must still submit applications (30) days prior to the beginning of each course(s).

Separate tuition assistance applications should be submitted for courses that begin and end on different dates.

Any employee receiving tuition assistance who interrupts schooling for more than twelve months will have to reapply for tuition assistance based on policy guidelines.

6. **COURSE CHANGES:** Course changes MUST be emailed to Tuition_Assistance@palmettohealth.org no later than 30 days after change authorized by the school and completed. There must be an approved application on file for changes to be made.
7. The class meeting schedules for each course submitted for tuition assistance shall not conflict with or interfere with the employee's regular job assignment.
8. The employee must scan and email required documentation to Tuition_Assistance@palmettohealth.org no later than **30** days after receiving final grades. Documentation must be received on the **Tuesday by 12 noon** prior to end of the pay period. Required documentation includes:
 - a) A completed and signed Tuition Assistance Request for Payment form
 - b) An official college transcript, certified electronic transcript or final grade report (minimum grade of C for approved certificate, associate or bachelor degree; minimum grade of B for master's and post master's certificate)
 - c) An itemized college statement/bill/invoice displaying tuition costs for the course(s)
 - d) An itemized book receipt(s) for the course(s)
9. For end of year reimbursement, official documentation must be received by **Monday, December 12th.**
10. If the employee resigns from Palmetto Health, moves to an ineligible status, or is dismissed for any reason (other than a reduction in workforce) prior to completing (2) years of continuous work in an eligible employment status, the employee will be required to reimburse Palmetto Health. The date of continuous work will be calculated based on the date of each disbursement. The payback commitment is as follows:
 - a) Less than one year of continuous work completed in eligible status, entire amount is due from employee (payback)

- b) After completing one year of continuous service in eligible status but less than two years, one-half (½) total amount is due from employee (payback)
- c) Example: Employee receives \$2,400 - entire amount due if employee does not complete first year, after completing year one of two and not completing second year, employees owes \$1,200.

Payroll will deduct the maximum amount allowable by law from the employee's first paycheck after moving to an ineligible status or from final check upon separation from Palmetto Health. If balance remains, employee must pay remaining balance within thirty days. If employee returns to eligible status within 90 days, remaining tuition dollars will be forgiven. Employees returning to eligible status after 90 days will reimburse Palmetto Health according to this policy.

A TWO YEAR CONTINUOUS WORK AGREEMENT IS MANDATED EACH TIME TUITION ASSISTANCE IS RECEIVED BY THE EMPLOYEE. HOWEVER, THE TIME IS WORKED OFF CONCURRENTLY. For example: if an employee receives \$2,400 in June, there is an obligation to work until June two years forward. If employee receives \$2,400 in December of same year, there is an obligation to work until December two years forward. If the employee resigns or moves to ineligible status in May of following year, employee owes \$2,400 for June disbursement and \$2,400 for December disbursement. If employee resigns or moves to ineligible status in July of following year, employees owes \$1,200 for June disbursement and \$2,400 for August disbursement.

11. When an employee is terminated for any reason, or is placed on disciplinary suspension prior to the completion of course(s), Palmetto Health will not be liable for tuition reimbursement.