



**POLICY TITLE:** Tuition Assistance Program

**Responsible Department:** Human Resources

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**SUBMITTED BY (AUTHOR):** Luz Murillo-Cruz

**Title:** Tuition Assistance Administrator

**APPROVED BY:** Lisa Miranda-Sixto

**Title:** Director, Leave/Disability Administration and Tuition Assistance

**APPROVED BY:** Margaret Marshall

**Title:** Assistant Vice President, Total Rewards

**APPROVED BY:** Adriene McCoy

**Title:** Corporate Vice President and Chief Human Resources Officer

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**SUMMARY & PURPOSE:**

To offer employees financial assistance for undergraduate and graduate educational enhancement, and to support Baptist Health South Florida's (BHSF) need for employees who have the education and training to improve individual and organizational performance.

**POLICY:**

Baptist Health is committed to providing the highest standards of clinical and service excellence and encourages employees to increase their skills, knowledge and value to the organization through continued education and training. Eligible employees may receive reimbursement for tuition costs according to the conditions established by this policy.

**SCOPE/APPLICABILITY:**

This policy applies to benefit eligible employees in good standing (i.e. with an overall rating of "Fully Meets Expectations" or higher on the employee's most recent performance evaluation; for leaders, a minimum Leader Evaluation Manager (LEM) score of 3.0 is required. Employees must not be on corrective action (step 2 or above) within six (6) months from the date of pre-approval or reimbursement request. Leaders must not be on a Performance Improvement Plan (PIP) at the time of the pre-approval or reimbursement request and will not be eligible for tuition assistance for the duration of the PIP. Employees must work a minimum of twenty (20) hours per week and have completed twelve (12) months of continuous employment as a regular full-time (FT) or regular part-time (PT) employee prior to applying for tuition assistance pre-approval or receiving the tuition assistance benefit.

Physicians, Per-Diem, Extra Pay Option (EPO), and employees on a leave of absence status are not eligible for tuition assistance. Employees currently participating in the Baptist Health Nurse Scholars Program are ineligible for tuition assistance, unless the employee receives pre-approval from the Tuition Assistance department to receive tuition assistance for pre-requisites the employee needs in order to participate in the approved Nursing

Scholars Program (Note: Employees who have outstanding debt to the Scholars, or Tuition Assistance Programs are ineligible to participate in the Tuition Assistance Program).

**PROCEDURES TO ENSURE COMPLIANCE:**

1. Applications from employees who have applied to, but were not approved for acceptance into a Scholars program, will be reviewed on a case-by-case basis. For approval consideration, the employee must follow the tuition assistance pre-approval process outlined in procedure section 12 of this policy.
  - a) The Tuition Assistance department may require applicants pursuing nursing degree programs be referred to the Scholars Department for career counseling as part of the pre-approval process.
2. While courses are in progress, employees must remain employed by Baptist Health and work a minimum of twenty (20) hours weekly. If an employee takes a continuous leave of absence (FMLA, Medical Non-FMLA, Work-Related, Military or Domestic Violence leave) after the employee starts classes from an approved program, the requirement that the employee work a minimum of twenty (20) hours weekly may be waived.
3. Employees participating in the Tuition Assistance Program must achieve for each course, a grade of "C" or better for undergraduate courses; or its numerical equivalent, or a grade of "B" or better for graduate courses; or its numerical equivalent, a complete grade for "complete/incomplete" courses, or a pass grade for "pass/fail" courses.
4. Definitions:
  - a. Qualifying Courses:  
All courses of study must:
    - i. Be offered by a fully accredited educational institution within the United States that is approved by the U.S. Department of Education (i.e. state university, college, technical or trade school).
    - ii. Lead to an undergraduate or graduate degree;
    - iii. Meet licensure requirements recognized by the State of Florida licensing or regulatory board of a health-care related career/field, if applicable;
    - iv. PhD/Doctorate degree approval is given only if the degree is required for the job, as stated on the job description. A limited number of doctorate degrees are approved each year based on BHSF needs.
5. Courses must meet at least one of the following criteria:
  - a. Be directly related to the employee's job and expected to improve the employee's job performance. This includes specialized programs that are expected to increase the employee's proficiency as determined by the employee's leader.
  - b. Programs of study that will prepare the employee for a position he/she is likely to occupy in the future and will assist in meeting the organization's goals and objectives.
  - c. Successful "challenge in proficiency exams" (i.e. CLEP, portfolios) provided the credits will be applied toward an undergraduate degree and reduce the overall cost of the educational program.
6. Non-Qualifying Courses and Expenses:
  - a. Admissions test
  - b. Course audits
  - c. Books
  - d. Seminars, workshops, and conferences not a part of a degree program
  - e. Lab fees
  - f. Out-of-state tuition
  - g. Activities/student union fees
  - h. Parking fees
  - i. Repayment of previous education loans
  - j. Delayed payment of fees
  - k. Fees to remain active when not taking a course
  - l. Course change or withdrawal fees, or fees for repeated courses that have been paid in the past

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- m. Change-of-grade or transcript fees
- n. Preparation courses for certification or certificate programs
- o. Certification test fees, including nursing exams
- p. Fees to maintain CEU credits required by certification or license
- q. Any additional fees not related to tuition, or cost per credit.

**7. Tuition Assistance Benefits:**

The tuition assistance benefit period will coincide with the traditional school calendar year: September 1<sup>st</sup> through August 31<sup>st</sup>. Expenses in excess of the maximum benefit amount cannot be carried over to a new calendar year. Reimbursement will be taxed according to IRS guidelines.

Eligible employees may be reimbursed the actual tuition cost up to a maximum of \$250 per credit for undergraduate degrees and \$500 per credit for graduate degrees, not to exceed the maximum annual benefit per school year (Note: employees approved for tuition assistance prior to 1/1/16 will be grandfathered through 12/31/16). On 1/1/17 all participants will be subject to the maximum per credit hour benefit of \$250 for undergraduate degrees and \$500 for graduate degrees.

<b>Degree Type</b>	<b>Employee Status</b>	<b>Maximum Benefit Per Credit</b>	<b>Maximum Annual Benefit</b>
Undergraduate	Regular Full Time	<b>\$250/credit</b>	\$5,000
	Regular Part Time	<b>\$250/credit</b>	\$2,500
Graduate	Regular Full Time	<b>\$500/credit</b>	\$10,000
	Regular Part Time	<b>\$500/credit</b>	\$5,000

Eligible employees will only be approved for no more than one Associate, one Bachelor and one Master degree during the course of employment.

If there is a change in employment status during the school semester, reimbursement will be based on the employee's status during the majority of the reimbursable period. For example, if the employee is full time for more than half the semester, he or she will receive reimbursement at the full time level and if more than half at part time, reimbursement at part time level.

An employee may be enrolled in a combination Bachelors/Masters degree program. For reimbursement of graduate level courses under such a program, the course of study must be approved in accordance with the Tuition Assistance Policy. If an employee is approved for the graduate degree and takes one or more graduate courses during a term, then the employee will be paid at the yearly graduate benefit level, rather than the undergraduate level for that term. Undergraduate and Graduate Specialization/Concentration may be covered under the Tuition Assistance policy as long as the curriculum for the program specialization/concentration is submitted as part of the initial pre-approval process.

**8. Coordination with Other Aid:**

Employees may be eligible for financial aid from outside sources in the form of discounts, subsidies, grants, or scholarships. Employees who receive such assistance are eligible for tuition assistance from Baptist Health for amount not covered by the outside source. Failure to report additional funding will result in the employee's forfeiture of continued access to Baptist Health's Tuition Assistance Program and may result in corrective

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action, up to and including termination, in accordance to Human Resources policy 5250 (Employee Conduct). A financial statement from the school will be required as part of the tuition reimbursement approval process.

9. Employment Obligation:

All employees receiving payment under this program for undergraduate or graduate degrees are obligated to remain employed at Baptist Health for a period of three years (36 months) after the last reimbursement is paid to the employee (Note: employees approved for tuition assistance prior to 1/1/16 will be grandfathered to the previous policy guidelines and continue to be subject to the two year employment obligation until 12/31/16. At that time, active tuition reimbursement program participants will be required to meet the three (3) year employment obligation). If the employee is unable to fulfill this employment obligation, that portion of monies not fulfilled shall be repaid to Baptist Health on a pro-rated basis.

10. Tuition Reimbursement Debt Collection:

If an employee does not remain employed with Baptist Health (including involuntary termination), or discontinues course of study, within three years (36 months) of receiving reimbursement, he or she will be responsible for repayment to Baptist Health for all monies paid as tuition reimbursement on a pro-rated basis, with first payment due within thirty (30) days of separation or discontinuation. If the former employee does not reimburse BHSF, he or she will be contacted for payment by a designated debt collection agency.

11. General Guidelines:

- a. Employee participation is voluntary.
- b. Classes started or completed prior to being approved by the Tuition Assistance Department will not be reimbursed.
- c. Pre-approval to participate in the Tuition Assistance Program does not guarantee transfer or promotion into a future position within Baptist Health. Employees must follow recruitment guidelines by applying for a position.
- d. The Tuition Assistance department may require applicants pursuing nursing degree programs be referred to the Scholars Department for career counseling as part of the pre-approval process.
- e. The Tuition Assistance department will only approve one Associate, one Bachelor and one Master degree during the course of employment.
- f. All required tuition assistance documentation must be emailed to the tuition assistance email at [BHSFTuitionAssist@baptisthealth.net](mailto:BHSFTuitionAssist@baptisthealth.net).
- g. All educational financial assistance will be reimbursed, if all policy criteria are met, upon receipt of a *Tuition Reimbursement Payment form*, along with submission of *Grade Sheet* and *Tuition Cost Statement*. Advance payment will not be allowed.
- h. Tuition reimbursement payments will be taxed, according to IRS guidelines, for reimbursements amounting to more than \$5,250 in a calendar year.
- i. Continued employment, reclassification, transfer, or promotion is not guaranteed during or after the period of study.
- j. Class preparation and/or homework associated with a study program must not be done during work hours. Baptist Health will not pay for in-school or homework time. If found doing school work, during work time, corrective action, up to and including termination, may result (refer to HR Policy 5250-Employee Conduct).
- k. Changes in employment status, course of study, or educational institution must be reported immediately to the Tuition Assistance department. A change in school, program, curriculum etc. will require the employee to reapply by submitting pre-approval documentation with the new information.
- l. If the employee does not access the tuition assistance benefit within twelve (12) months of initial approval and/or receiving benefits, the account will be closed and the employee must reapply.

12. Procedure:

The Tuition Assistance department will administer the program and will be responsible for educating employees about the program, processing applications and payments, tracking the progress of participants, and periodically reporting on the status of the program. Policy statements, application forms, and instructions

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are available in the Baptist Health Intranet. Contact the Tuition Assistance department at 786-596-7233 if you have questions or need additional information.

- a. Prior to enrolling in classes, employees must obtain pre-approval to participate in the Tuition Assistance program by submitting the completed *Pre-Approval Application for Tuition Assistance form and their School Program Curriculum* to the Tuition Assistance department at least thirty (30) days prior to the anticipated start date. All pre-approval documentation must be submitted to and will only be accepted from the Tuition Assistance Email (BHSFTuitionAssist@baptisthealth.net). Classes that start prior to the approval date provided by the Tuition Assistance department will not qualify for reimbursement.
  - i. For nursing degree programs, the Tuition Assistance department may require employee referral to the Scholars department for career counseling as part of the pre-approval process.
- b. Immediately following and no later than sixty (60) days from the end of each class, the employee must submit the completed *Tuition Reimbursement Payment form, Grade Sheet, and Tuition Cost Statement* to the Tuition Assistance department. All tuition reimbursement documentation must be submitted to and will only be accepted from the Tuition Assistance Email (BHSFTuitionAssist@baptisthealth.net). Reimbursement will not be approved if forms are received by the Tuition Assistance department after sixty (60) days from the end of each class.
- c. Upon degree/program completion, employees must notify the Tuition Assistance department of their graduation date and provide supporting graduation documentation (i.e. copy of diploma).

**SUPPORTING/REFERENCE DOCUMENTATION:**

- N/A

**RELATED POLICIES, PROCEDURES, AND ASSOCIATED FORMS:**

Forms/Documents:

- Pre-Approval Application for Tuition Assistance form (available in the Baptist Health Intranet)
- School Program Curriculum
- Tuition Reimbursement Payment Form (available in the Baptist Health Intranet)
- Tuition Cost Statement
- Grade Sheet

Policies:

- BHSF Administrative Policy 5250 Employee Conduct – Human Resources
- BHSF Administrative Policy 6610 Omnibus Accountability – Human Resources

**ENFORCEMENT & SANCTIONS:**

Violation of this policy may lead to disciplinary action, up to and including termination of employment.