Baptist Health South Florida

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TYPE: Administrative

POLICY TITLE: Tuition Assistance Program

Responsible Department: Human Resources

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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:
BHSF 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.

The employee's leader will play an active role in discussing and reinforcing the employees' participation in the Tuition Assistance Program. As part of the process, the employee and the employee's leader must complete the *Career Development Plan* form.

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 or the equivalent to a minimum 3.0 score for leaders on LEM). 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 (6 months prior to 10/1/14) as a full-time (FT), modified full-time (MFT) or regular part-time (RPT) employee prior to applying for tuition assistance pre-approval or receiving the tuition assistance benefit. Per-Diem, Extra Pay Option (EPO), and employees on a leave of absence status are not eligible for tuition assistance. Employees enrolled in a course of study prior to obtaining pre-approval from the Tuition Assistance department are ineligible 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 their approved Nursing Scholars Program (Note: Employees who have outstanding debt to the Scholar's, 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 Scholar's 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 section 13 (a) of this policy.

2. While courses are in progress, employees must remain employed by BHSF 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 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 be:
      i. 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.

5. Preparation Courses for Certification ***(Note: As of October 1, 2014, the Tuition Assistance department will no longer cover this expense and it will be the individual department's responsibility to budget for this expense):***
   a. Non-Nursing Positions:
      Only until September 30, 2014 (9/30/14), employees in non-nursing positions may be eligible for tuition reimbursement of diploma, certificate, and review courses in preparation for certification which consist of a series of classes and that are recognized by national registries and societies. Certification exams are not eligible for tuition reimbursement.
   b. Nursing Positions:
      Only until September 30, 2014 (9/30/14), certification exam sitting fees in the specialty area in which the nurse is currently working are eligible for tuition reimbursement. Only one (1) certification exam will be reimbursed per benefit year. Review course expenses incurred in preparation for clinical specialty certification exams and certification renewals are not eligible for tuition reimbursement.

6. 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.

Note: The leader's signature indicates his/her understanding and support of the courses as they directly relate or are relevant to the employee's current or future position in the organization. Final approval is granted by the Tuition Assistance department.

7. 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
   m. Change-of-grade or transcript fees
   n. Certification test fees (except for nursing specialty certification exams only until 9/30/14)
   o. Fees to maintain CEU credits required by certification or license
   p. Any additional fees not related to tuition, or cost per credit.

8. Tuition Assistance Benefits:
   The tuition assistance benefit period will coincide with the traditional school calendar year: September 1st through August 31st. 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.

   Employees may be reimbursed up to the following amounts:

   a. Preparation Courses for Certification for no more than one certification per benefit year (If eligible, covered under this policy only until 9/30/14):

Regular Full Time (FT) and Modified Full Time (MFT) employees	$ 500.00
Regular Part Time (RPT) employees	$ 250.00

   b. Undergraduate Programs for no more than one Associates or one Bachelors degree (i.e., not two Bachelors degrees):

Regular Full Time (FT) and Modified Full Time (MFT) employees	$ 5,000.00
Regular Part Time (RPT) employees	$ 2,500.00

   c. Graduate Programs for no more than one Masters degree (i.e., not two Masters degrees):

Regular Full Time (FT) and Modified Full Time (MFT) employees	$ 10,000.00
Regular Part Time (RPT) employees	$ 5,000.00

   d. PhD/Doctorate Programs for no more than one PhD/Doctorate degree:

Regular Full Time (FT) and Modified Full Time (MFT) employees	$ 10,000.00
Regular Part Time (RPT) employees	$ 5,000.00

   e. Clinical Certification Exams (If eligible, covered under this policy only until 9/30/14):

National Certification in specialty unit where nurse is currently working (CCRN, OCN, AMSN, etc.)	Up to $ 400.00

   If there is a change in employment status during the 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/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.

9. 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 BHSF only at a maximum up to the amount not covered by the outside source. Failure to report additional funding will result in the employee's forfeiture of continued access to BHSF Tuition Assistance Program and may result in corrective 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.

10. Employment Obligation:
    All employees receiving payment under this program for undergraduate or graduate degrees are obligated to remain employed at BHSF for a period of two years (24 months) after the last reimbursement is paid to the employee. If the employee is unable to fulfill this employment obligation, that portion of monies not fulfilled shall be repaid to BHSF on a pro-rated basis.

11. Tuition Reimbursement Debt Collection:
    If an employee does not remain employed with BHSF (including involuntary termination), or discontinues course of study, within two years (24 months) of receiving reimbursement, he/she will be responsible for repayment to BHSF for all monies paid as tuition reimbursement on a pro-rated basis, with first payment due within thirty (30) days of separation or discontinuation. Non-payment will result in attempt to contact the employee for payment. Further correspondence will be handled by a designated debt collection agency.

12. 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 is not a guarantee of a promotion into a future position within BHSF. Employees must follow recruitment guidelines by applying for a position.
    d. The Tuition Assistance department will only approve one Associates, one Bachelors, one Masters, and one PhD/Doctorate degree during the course of employment.
    e. All educational financial assistance will be reimbursed upon completion and receipt of a *Tuition Reimbursement Payment form*, along with submission of *Grade Sheet* and *Tuition Cost Statement*. Advance payment will not be allowed.
    f. Tuition reimbursement payments may be subject to IRS guidelines.
    g. Continued employment, reclassification, transfer, or promotion is not guaranteed during or after the period of study.
    h. Class preparation and/or homework associated with a study program must not be done during work hours. BHSF will not pay for in-school or homework time. If found doing school work, during work time, corrective action, up to an including termination, may result (HR Policy 5250-Employee Conduct).
    i. 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.

j. If the employee does not access the tuition assistance benefit within twelve (12) months of initial approval or during the course of receiving this benefit, the account will be closed and the employee must reapply.

13. Procedure:

The Tuition Assistance department will administer the program and will be responsible for counseling 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 are available on the Intranet at Baptist Health University under the Tuition Assistance/Scholars tab. 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 approval of the program of study by submitting the completed *Pre-Approval Application for Tuition Assistance form*, the *Career Development Plan* form, and *Program Curriculum* to the Tuition Assistance department for approval and processing at least thirty (30) days prior to the anticipated start date. Classes that start prior to the approval date will not qualify for reimbursement. A meeting may be scheduled with the employee for tuition assistance counseling purposes.
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 via fax number (786-596-1312). 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 completion of program, employee must notify the Tuition Assistance department of the graduation date.
d. For reimbursement of clinical certification exam sitting fees (covered in this policy only until 9/30/14), the nurse must provide documentation of successful completion of the certification exam. This documentation must include receipt of the exam sitting fee (no other fees will be covered), evidence of the certification obtained by successfully passing the exam, and a completed *Nursing Specialty Certification Exam* form for reimbursement. Repeat examination fees will not be reimbursed; however, if the nurse is successful upon second attempt, they will be eligible for reimbursement of the original examination fees. Certification renewals are not covered by this policy.

SUPPORTING/REFERENCE DOCUMENTATION:

- N/A

RELATED POLICIES, PROCEDURES, AND ASSOCIATED FORMS:

Forms/Documents:

- Pre-Approval Application for Tuition Assistance form (available in BHSF Intranet)
- Career Development Plan form (available in BHSF Intranet)
- School Program Curriculum
- Tuition Reimbursement Payment Form (available in BHSF Intranet)
- Tuition Cost Statement
- Grade Sheet
- Nursing Specialty Certification Exam form (available in BHSF Intranet)

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.

Baptist Health South Florida

PRE-APPROVAL FOR COURSE OF STUDY
APPLICATION FOR TUITION REIMBURSEMENT

TO BE COMPLETED BY EMPLOYEE

Last Name	First Name	MI	Employee ID

Address	City	Zip

Work Phone	Home Phone	Contact Phone

Work E-mail	Other E-mail

Job Title	Department Name & Entity	Date of Hire

Degree/Certificate Sought	Educational Institution	Graduation/Completion Date (Month/Year)

I hereby acknowledge that I have received, read, and fully understand BH HR policy #4100 (Tuition Reimbursement), and agree to abide by the terms and conditions specified. I specifically acknowledge and agree that I am obligated to remain employed at Baptist Health South Florida for a period of two years (24 months) after the last reimbursement is paid to me. If I am unable to fulfill this employment obligation, I am obligated to repay to Baptist Health on a pro-rated basis (based upon the portion of the 24 month commitment worked by me), the money paid to me under the tuition reimbursement program, as per HR Policy 4100.

Applicant Signature	Date

TO BE COMPLETED BY EMPLOYEE'S DEPARTMENT

Employment Verified:	Last Performance Evaluation (if on file):
☐ FT ☐ MFT ☐ RPT	☐ Meets Expectations ☐ Exceeds Expectations

Has employee received written corrective action or above within the last six months (ie: step 2)? ☐ Yes ☐ No

Employee's Leader	VP/CEO Approval (for Doctorate Degree only)
_____ _____ Signature Date Extension _____ Print Name	_____ _____ Signature Date Extension _____ Print Name

TUITION REIMBURSEMENT NOTES

Tuition Reimbursement Adminstrator/Representative/Date	Approved: ☐ Yes ☐ No

Complete and submit this form along with your Career Development Plan and curriculum via the Tuition Reimbursement fax line: (786) 596-1312.

Baptist Health South Florida

CAREER DEVELOPMENT PLAN

TO BE COMPLETED BY EMPLOYEE AND SUPERVISOR/MANAGER: The objective of the Baptist Health Tuition Reimbursement program is to upgrade the quality of our employees in areas which benefit our patients and the organization. This form outlines your career plan and stimulates dialogue with your supervisor as to how the plan fits your needs and the needs of the organization. The original form should be kept in the employee's department file for further dialog and follow-up. A copy should be sent to the Tuition Reimbursement office.

Degree/Certification Program: _____

School: _____ Grad/Completion Date: _____

1. This education will (please check appropriate response):
   - ☐ Improve the employee's skills in the current position
   - ☐ Prepare the employee for a position he/she is likely to occupy in the future

   Title of new position: _____

2. How will this course of study help the goals of:
   - a. The employee? _____
   - b. The organization? _____
3. What actions will the employee take to achieve the above?
   - a. _____
   - b. _____
   - c. _____
4. What actions will the supervisor take to support the employee to achieve the goal(s)?
   - a. _____
   - b. _____
   - c. _____

I have met to discuss this career development plan.

_____		_____	
Immediate Leader	**Date**	Print name	Extension
_____		_____	
Employee		Print name	Employee ID#

Baptist Health South Florida

REQUEST FOR TUITION REIMBURSEMENT PAYMENT

TO BE COMPLETED BY EMPLOYEE

Last Name	First Name MI	Employee ID
Address	City	Zip
Work Phone	Home Phone	Contact Phone
Work Email	Other Email	
Job Title	Department Name & Entity	Date of Hire
Degree/Certificate Sought	Educational Institution	Graduation/Completion Date (Month and Year)

Has any of the above information changed since initial application? ☐ Yes ☐ No

Class Title/Abbreviation (Ex., MGT356)	No. of Credits	Final Grade	Cost per Credit	Total Cost	Class End Date

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Applicant Signature	Date

TO BE COMPLETED BY EMPLOYEE'S LEADER

Employment Verified:
☐ FT ☐ MFT ☐ RPT

Last Performance Evaluation (if on file):
☐ Meets Expectations ☐ Exceeds Expectations

Has employee received written corrective action or above within the last six months (ie: step 2)? ☐ Yes ☐ No

Was the employee's class schedule reviewed and discussed? ☐ Yes ☐ No

Employee's Leader	VP Approval (Doctorate Degree only)
Signature Date Extension	Signature Date Extension
Print Name	Print Name

Complete and submit this form along with grades and tuition cost documentation via the Tuition Reimbursement fax line: (786) 596-1312. **Application must be received within 60 days from the end of each class.**

Baptist Health South Florida

NURSING SPECIALTY CERTIFICATION EXAM APPLICATION FOR REIMBURSEMENT

TO BE COMPLETED BY EMPLOYEE

Last Name	First Name MI	Employee ID
Address	City	Zip
Work Phone	Home Phone	Contact Phone
Work Email	Other Email	
Job Title	Department Name & Entity	Date of Hire
Title of Specialty Certification:	Educational Institution for Prep Course:	

Certification Exam		Cost of Exam	Exam End Date

I hereby acknowledge that I have received, read, and fully understand BH HR policy #4100 (Tuition Reimbursement), and agree to abide by the terms and conditions specified. I specifically acknowledge and agree that I am obligated to remain employed at Baptist Health South Florida for a period of two years (24 months) after the last reimbursement is paid to me. If I am unable to fulfill this employment obligation, I am obligated to repay to Baptist Health on a prorated basis (based upon the portion of the 24 month commitment worked by me), the money paid to me under the tuition reimbursement program, as per HR Policy 4100.

Applicant Signature	Date

TO BE COMPLETED BY EMPLOYEE'S LEADER

Employment Verified:	Last Performance Evaluation (if on file):
☐ FT ☐ MFT ☐ RPT	☐ Meets Expectations ☐ Exceeds Expectations

Is the employee participating in the Professional Nursing Advancement Program (PNAP)? ☐ Yes ☐ No

Has employee received written corrective action or above within the last six months (ie: step 2)? ☐ Yes ☐ No

Leader Signature _____ Date _____ Extension _____ Email address _____

Print Name _____

Complete and submit this form along with successful completion and cost documentation via the Tuition Reimbursement fax line: (786) 596-1312. **Application must be received within 60 days from successful exam completion date.**