

# EDUCATIONAL ASSISTANCE

## *Frequently Asked Questions*

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## Definitions

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### What is educational assistance?

- ◇ Central or departmental financial support for approved educational activities

### Who are eligible team members?

- ◇ Regular full and part-time (20+ hours/week), flex staff, and management team members who have completed six (6) consecutive months of employment with the Medical Center or the Academic Division prior to the beginning of the course for which he/she is requesting assistance
- ◇ RN Clinician 1's are eligible at the time of hire with no waiting period
- ◇ Team members must be in good standing at the time the educational assistance request is submitted

### Who are not eligible team members?

- ◇ Unit-Based and Medical Center Pool and temporary team members
- ◇ Generally, team members who have received formal performance improvement counseling within the previous six months will not be eligible

### What are eligible educational activities?

- ◇ Eligible courses
  - An academic credit course leading to an Associate's, Bachelor's, Master's or Doctoral degree
  - Review course for a Professional Certification that is of value/benefit to the Medical Center as determined by the department primarily responsible for managing the practitioner
  - English as a Second Language (ESL), literacy, and related classes
  - Lean or other related classes
- ◇ Eligible professional certifications
  - A professional certification that is of value/benefit to the Medical Center, as determined by the department manager

### What is satisfactory course completion?

- ◇ For undergraduate courses, eligible academic courses taken for a grade or credit must be completed with a grade of C- or better
- ◇ For graduate courses, eligible academic courses taken for a grade or credit must be completed with a grade of B- or better
- ◇ If the course is not graded, documentation of pass (if pass/fail) shall serve as evidence of course completion

### What is a professional certification completion?

- ◇ Confirmation of mastery or competency awarded by a third party, standard-setting organization which results from an assessment process with on-going requirements to maintain certification, such as a Certification in Critical Care Nursing (CCRN)

### What is not an eligible educational activity?

- ◇ Professional development activity
  - Other educational activity or program not resulting in college credit or certification, such as conferences, certificate programs, professional association programs, training programs, and non-credit continuing education programs

## ***Criteria and Guidelines***

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### **What is the criteria?**

- ◇ Part-time study for eligible academic courses
- ◇ Courses may be taken at an accredited business school, community college, professional or technical institute, college or university and applies to traditional in-person , as well as online, courses
- ◇ Academic coursework must be taken for credit

### **What does educational assistance cover?**

- ◇ Eligible courses
  - Tuition
  - Registration fees
  - Exam fees
  - Laboratory fees
- ◇ Professional certification
  - Application fees
  - Exam fees

### **What does educational assistance not cover?**

- ◇ Non-education related fees (e.g., activity fees)
- ◇ Expenditures for books
- ◇ Expenses that have been waived or paid through other sources (e.g., veteran’s educational payments, scholarships, and grants)

### **What amount of educational assistance is provided for eligible academic courses?**

- ◇ Team members who are **not** in “[hard to fill](#)” positions, up to \$2,000 per calendar year
- ◇ Team members who are in “[hard to fill](#)” positions or pursuing degree requirements for a “hard to fill” position, up to \$5,250 per calendar year

### **What amount of educational assistance is provided for eligible professional certifications?**

- ◇ Up to \$375 per calendar year

### **What is a calendar year?**

- ◇ January 1 through December 31

### **When will educational assistance reimbursement be provided?**

- ◇ After satisfactory completion of an eligible academic course or professional certification

### **When will educational assistance benefits not be provided?**

- ◇ If the satisfactory course completion requirement is not met
- ◇ If the team member drops or withdraws from a course
- ◇ If the team member terminates their employment (Please see the Separation of Employment section for additional information)

### **Who is responsible for monitoring educational assistance benefit limits?**

- ◇ The team member

## *Advance Tuition*

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### **Who is eligible for advance tuition?**

- ◇ Team members with two (2) or more years of continuous employment, who have a base salary of \$50,000 or less
- ◇ Team members enrolled in eligible academic courses at the University of Virginia who have been approved for educational assistance

### **When do I submit a request for advance tuition?**

- ◇ Upon obtaining supporting documentation indicating the title and cost of the course

### **How do I submit a request for advance tuition?**

- ◇ Online via the PeopleSoft Finance Expense Reimbursement system with supporting documentation
- ◇ Refer to the Educational Assistance Job Aid for a step-by-step guide on how to submit a request for advance tuition

### **Who initially reviews and approves my advance tuition request?**

- ◇ The department manager

### **What happens after my manager initially approves the advance tuition request?**

- ◇ Approved expenses will be forwarded to Human Resources for verification of eligibility

### **When will Human Resources approve the advance tuition request?**

- ◇ If eligibility criteria is met, the request will be approved and processed for payment within 2 business days
- ◇ **Please note:** Under the PeopleSoft Finance Expense Reimbursement system, payments will be applied against the calendar year maximum for the year in which payment is received

### **How will I receive my advance tuition?**

- ◇ Payments will be direct deposited in the team member's account following final approval

### **Do I need supporting documentation after course completion?**

- ◇ Yes, you are required to submit evidence of satisfactory course completion to Human Resources within 30 days or repay the advance tuition amount

## *Reimbursement Requests*

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**Who is responsible for reviewing the Educational Assistance [Policy No. 301](#) prior to registering and paying for the course?**

- ◇ The team member

**When can I submit a request for reimbursement?**

- ◇ Request must be submitted within 30 days following successful completion of the course or professional certification
- ◇ **Please note:** Under the PeopleSoft Finance Expense Reimbursement system, payments will be applied against the calendar year maximum for the year in which payment is received. For example, if a team member has previously received \$1,500 in payments toward their \$2,000 calendar year maximum for 2017, a \$800 reimbursement request for an eligible course completed at the end of 2017 would result in a maximum benefit of \$500 if paid in 2017 ( $\$1,500 + \$500 = \$2,000$  max). Any payments made in 2018 would be applied toward the 2018 calendar year maximum.

**How do I submit a request for reimbursement?**

- ◇ Online via the PeopleSoft Finance Expense Reimbursement system with supporting documentation
- ◇ Refer to the Educational Assistance Job Aid for a step-by-step guide on how to submit a request for reimbursement

**Who initially reviews and approves my reimbursement request?**

- ◇ The department manager

**What happens after my manager initially approves the reimbursement request?**

- ◇ Approved expenses will be forwarded to Human Resources for verification of eligibility

**How will I receive my reimbursement?**

- ◇ Payments will be direct deposited in the team member's account following final approval

## *Modifying Work Schedules*

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Who is responsible for determining if the credit load and/or eligible academic course schedule requested will interfere with the team member's work commitment or performance?

- ◇ The manager

## *Taxation*

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**Is educational assistance taxable?**

- ◇ The dollar value of educational assistance provided through the [Policy No. 301](#) may be taxable income depending on the total value received in a tax year

**When is educational assistance taxable?**

- ◇ Education benefits exceeding \$5,250 in a calendar year are taxable income

**What can I refer to for detailed information on Tax Benefits for Education?**

- ◇ [IRS Publication 970](#)

## *Separation from Employment*

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**What happens if I leave the Medical Center?**

- ◇ If an team member leaves the Medical Center and is not transferring to the Academic Division, the team member will be required to repay any educational assistance **reimbursement** amounts received within twelve (12) months prior to termination
- ◇ If an team member leaves the Medical Center and is not transferring to the Academic Division, the team member will be required to repay any **tuition advance** payments for courses that are completed less than twelve (12) months prior to termination

**How will I be required to repay?**

- ◇ Appropriate deductions will be made to recoup the full amount of these assistance payments from the team member's final pay and collection efforts will be initiated for any unpaid amounts