

2014 Tuition Reimbursement



Program Overview

Attending school can open many doors for your career, but paying for school can be a big challenge. Texas Health offers the Tuition Reimbursement Program to help you further your education. Through the Tuition Reimbursement Program, Texas Health will reimburse tuition and some recurring fees for approved degrees that benefit Texas Health or your position at Texas Health (certificate programs are not eligible for tuition reimbursement).

Courses must be taken at universities, colleges and vocational tech schools in the U.S. that have been accredited by specific nationally recognized accrediting agencies as defined in the table on the next page. The Texas Health Benefits Department administers the Tuition Reimbursement Program.

This booklet gives you important information about your Texas Health Tuition Reimbursement Program so you can make informed decisions.

Key Actions to Take

- Verify that you are eligible to participate in the Tuition Reimbursement Program.
- Determine if your coursework or field of study is eligible for reimbursement through the program.
- Submit your request for reimbursement no later than 60 days after completing the courses.

Eligibility

Full-time and part-time benefits-eligible employees (as defined in Employee Benefits Handbook) may participate. The following are not eligible:

- Medical directors employed under contract
- Medical residents or interns
- Administrative residents or interns
- Fellows or interns
- Dependents of employees

To be eligible for the Tuition Reimbursement Program, you must have six or more months of service before the start of the courses. (This rule is waived for employees pursuing clinical degrees). Exceptions are made for employees on military leave. You may be on a leave of absence while taking the courses, but you must be actively at work when any of the following occur:

- You submit your reimbursement request
- Your payment is processed

How to Submit Your Reimbursement Forms and Documentation

To access the Tuition Reimbursement site, go to www.MyTHR.org. Scroll down to the blue "Tuition Reimbursement" banner.

To submit reimbursement forms and/or documentation, use one of the following methods:

- Fax to (682) 236-7291
- Email to THRTuitionReimbursement@texashealth.org
- Mail copies or present in person to:
Texas Health Tuition Reimbursement Program
612 E. Lamar Blvd., Suite 400
Arlington, TX 76011-4014

If you have questions call 1-(877) MyTHRLink (1-877-698-4754), prompt 6, press 2, send an e-mail to THRTuitionReimbursement@texashealth.org or call us locally at (682) 236-6238.

Approved Accrediting Agencies

| All Degrees |
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| <p>To be eligible, courses must be taken from a university, college, vocational or technical school in the U.S. that is accredited by one of the following associations.</p> <ul style="list-style-type: none"> Southern Association of Colleges and Schools (SACS) Middle States Association of Colleges and Schools (MSA-CHE) New England Association of Schools and Colleges (NEASC-CIHE) North Central Association of Colleges and Schools (NCA-HLC) Northwest Commission on Colleges and Universities (NWCCU) Western Association of Schools and Colleges — Senior Colleges (WASC-ACSCU) Western Association of Schools and Colleges — Junior Colleges (WASC-ACCJC) Association of Biblical Higher Education (ABHE) Accrediting of the Association of Theological Schools (ATS) (recognized at the undergraduate level only) <p>This list of associations is not all-inclusive. If your school or university is not accredited by one of these associations, contact Tuition Reimbursement.</p> |
| Clinical Degrees |
| <p>In addition to one of the above accreditations for all degrees, clinical courses must be taken from a school that is accredited by one of the following:</p> <p>Nursing</p> <ul style="list-style-type: none"> National League for Nursing Accreditation Commission (NLNAC) — All levels of nursing education American Association of Colleges of Nursing — Commission on Collegiate Nursing Education — BSN or higher degree programs <p>Allied Health Professions</p> <ul style="list-style-type: none"> Radiologic Science — Joint Review Committee on Education Radiologic Technology (JRCERT) Clinical Lab Sciences — National Accreditation Association for Clinical Lab Sciences (NAACLS) Commission on Accreditation of Allied Health Education Programs (CAAHEP) Speech Language Pathologist — American Speech Language Hearing Association (ASHA) Physical Therapy — Commission on Accreditation of Physical Therapy Education (CAPTE) Occupational Therapy — Accreditation Council for Occupational Therapy Education (ACOTE) |

Eligible Degrees and Coursework

| Topic | Description |
|------------------------------------|--|
| Clinical degrees | <p>Employees are eligible for reimbursement of coursework for clinical degrees including all registered nursing positions, respiratory therapist, radiographer, pharmacist, social work, PT, OT, ST, pre-med students and other licensed or professional health care positions for which Texas Health typically hires.</p> <p>Reimbursement for clinical degrees up to:</p> <ul style="list-style-type: none"> \$5,250 per year for full-time employees and part-time benefits-eligible employees who are considered full-time students under their degree plan (usually 12 credit hours per semester) and enrolled in clinical courses \$2,625 per year for part-time employees <p>In addition to tuition, you may submit receipts for reimbursement of textbooks (books purchased from individuals are not covered).</p> <p>Books for clinical nurse leader programs are not eligible for reimbursement.</p> |
| Non-clinical degrees | <p>Benefits-eligible employees who have completed six months of service prior to the semester/course start date are eligible for tuition reimbursement, up to the following maximums:</p> <ul style="list-style-type: none"> \$4,000 per year for full-time employees \$2,000 per year for part-time employees <p>Textbooks are not reimbursable for non-clinical degree plans; however, recurring mandatory fees are eligible to be paid.</p> |
| Graduate Equivalency Diploma (GED) | <p>Benefits-eligible employees are eligible for reimbursement of expenses related to completing a high school education through a Graduate Equivalency Diploma (GED).</p> |
| Online courses | <p>Clinical degrees may be earned online. If you do not already possess a license or are not already registered, you must have approval in advance of attending these courses. Contact Tuition Reimbursement for additional qualification information. Online courses for non-clinical degrees are covered for approved degrees taken at a College or University that is accredited by one of the agencies listed above.</p> |

How the Program Works

| Topic | Description |
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| How to apply | Effective 1-1-2014; an upfront application is no longer required, unless you receive advance funds. |
| How you are reimbursed | <p>You must be actively at work in a benefits-eligible position at the time you submit your reimbursement request and at the time your reimbursement is processed. If your job is eliminated during your semester, you are eligible to receive Tuition Reimbursement if you meet all other requirements of the program.</p> <p>Within 60 days after completing the courses, you must submit your itemized receipts (including receipts for textbooks, if enrolled in a clinical program), a grade report reflecting a grade of C or better (or passing grade in a pass/fail course), a course schedule reflecting the course start and end date, along with a signed Tuition Reimbursement Request Form found at www.MyTHR.org on the left side of the page. Always include your name and ID number on all documents.</p> <p>To request reimbursement for tuition and or books:</p> <ul style="list-style-type: none"> • Log on to www.MyTHR.org • Scroll down to Tuition Reimbursement and click "Request reimbursement at the end of your semester/course" • Click on the Request for Reimbursement button • Select the name of the College or University you attended and the number of courses you have completed • Click continue • Input your estimated graduation date • Select your Major and Degree from the drop down boxes • Input the course start and end dates • Input your correct e-mail address • Input the course type, course number, course name, method of instruction, credit hours, the tuition and fees, scholarships or grants • Input any comments • Click the submit button • Add books (clinical degrees only) • Click the submit button • Click the Print button • Read, sign, and date the form <p>Be sure to include an itemized fee statement or invoice from the College or University, a grade report with your name preprinted on it (Blackboard or grade book reports are not acceptable), and a copy of your course schedule. If you are in a clinical degree plan and are requesting book reimbursement, please send an itemized book receipt along with the other requested documents.</p> <p>Scholarship or grant money received by the student may reduce benefits payable through the Tuition Reimbursement Program.</p> <p>Once the documents have been received in our office, you will receive a confirmation e-mail and an acknowledgment e-mail when the documents have been processed. Please allow 1-2 payroll periods for your reimbursement to be processed. This time frame may vary.</p> <p>If a Career Development Plan (CDP) is required, the Tuition Reimbursement system will re-directed you to the CDP web site for completion. An acknowledgement email will be sent once your CDP has been approved by the Texas Health Resource University. Your reimbursement request cannot be processed until our records indicate your CDP has been approved. Contact the Texas Health Resources University at (682) 236-6162 if you require additional information regarding the CDP process. Please note a CDP is not required each semester.</p> |
| How to submit your reimbursement forms and documentation | <p>You may fax your documents to 682-236-7291, email them to THRTuitionReimbursement@TexasHealth.org, mail or deliver copies to:</p> <p>Texas Health Tuition Reimbursement Program 612 E. Lamar Blvd., Suite 400 Arlington, TX 76011-4014</p> |
| Requesting advance Funds | You may request advance tuition assistance if you are a full-time employee with an annual base rate of \$25,000.00 or less or a part-time benefits-eligible employee with an annual base rate of pay of \$12,250.00 or less. All eligibility, maximums, and other policy requirements apply to advances. More information about advance funds is provided later in this section. |

How the Program Works (continued)

| Topic | Description |
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| Expenses that are not covered | The Tuition Reimbursement Program does not reimburse charges for professional meetings, workshops, conventions, drop fees, exam fees, late fees, supply kits, licensures, room and board, parking fees, uniforms, drug screens, background checks, certification courses, CEUs, insurance costs, review courses, tests or preparation for tests (such as NCLEX, GMAT, LMAT, MCAT, and TASP) or fees to CLEP, books purchased from individuals, shipping and handling, supplies lab packs, laptops, software, nurse skills pack, college repeat fees, association fees, Tuition and fees for degree plans that do not benefit Texas Health or your position at Texas Health. Contact Tuition Reimbursement for a complete list of expenses that are not covered. |
| Taxation of tuition reimbursement | Reimbursements of up to \$5,250 per tax year are not taxable income. Any reimbursement that exceeds \$5,250 in a calendar year will be taxed, even if the payment was for the prior benefit year. |

Changes in Employment

| Topic | Description |
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| If you are hired by Texas Health in a clinical position | <p>Non-clinical employees who currently participate in the Tuition Reimbursement Program may qualify for a \$4,000 transition assistance if they are hired by Texas Health in a clinical position (if they are .75 FTE or more) within six months of graduation. The assistance, which is taxable income, is intended to help with the transition into the work setting and cover expenses such as housing deposits and relocation costs.</p> <p>If you leave Texas Health or transfer to a non-clinical position or non-benefits eligible position before completing two years employment in a full-time clinical position, you are required to repay the full \$4,000. Texas Health will make every effort to recover all outstanding Tuition Reimbursement funds (including transition assistance). This includes deducting any amount due from available funds in the possession of Texas Health (payroll checks, PTO), as well as utilizing outside collection agencies. After two years of service in a full-time clinical position with Texas Health, the assistance will be completely forgiven.</p> <p>Employees must apply for the assistance within one year of being hired by Texas Health in a full-time clinical position. You can obtain a transition assistance application from Human Resources. Assistance will not be paid until you provide proof that you have passed your boards and you are actively at work in a clinical position at the time the assistance is requested and processed.</p> |
| If your employment status changes | <p>If you terminate employment or change to a non-benefits eligible status (such as PRN or part-time benefits-ineligible, as defined in the Employee Benefits Handbook) within 12 months your payment date, you will be required to repay the reimbursed funds paid on your behalf (including transition assistance) to Texas Health. However, if your position is eliminated and you are eligible for separation pay or you did not voluntarily change to the non-benefits eligible status, you will not be required to repay the funds as long as you searched for a position and did not turn down a reasonable offer.</p> <p>If you terminate or give notice that you will terminate or change to a non-benefits eligible position before completing the course, you will not receive the tuition reimbursement for your courses. All advance funds paid to you or your school could be deducted from your final regular paycheck (this includes any PTO payout you might receive). You will be responsible to reimburse Texas Health for any uncollected amounts.</p> |

Advance Funds Eligibility

If you are a full-time employee with an annual base rate of \$25,000 or less or a part-time employee with an annual base rate of \$12,250 or less, you qualify for advance funds. Texas Health will pay for your coursework in advance once your application is approved. All employees who are eligible to receive advance funds must input an application prior to their course start date. You will have to print a voucher and give it to the school as your source of payment.

If you have already paid for your classes and want to request advance funds, you may ask for advance reimbursement of the payment by submitting your class schedule and paid invoice itemizing the cost of tuition and recurring mandatory fees. Recurring fees do not include fees for parking, insurance, or transportation fees. Fax these documents, along with the Reimbursement Request Form. Write "Advance Funds Requested" in large letters on the form and fax it to (682) 236-7291 or scan your documents to THRTuitionReimbursement@TexasHealth.org.

If you are in a clinical degree plan and eligible for advance funds, you may also request advance reimbursement for your textbooks. Buy your books and submit a copy of the receipt along with a Tuition Reimbursement Request form.

Grades

If your final grade is not a C or above (or passing in a pass/fail class) or you do not submit your grades within 60 days after completing the course, the advance funds and book reimbursement that Texas Health has paid in advance will be deducted from your pay over a number of pay periods, listed in the table below.

| If you owe this amount: | Your repayments will be over: |
|-------------------------|-------------------------------|
| \$2,000 or more | 15 pay periods |
| \$1,000 - \$1,999 | 10 pay periods |
| \$500 - \$999 | 8 pay periods |
| \$300 - \$499 | 6 pay periods |
| \$200 - \$299 | 4 pay periods |
| \$199 or less | \$50 a pay period |

Payroll deductions will be at least \$50. However, the final deduction may be lower if you owe less than \$50. You are not eligible for further advance funds until you have completely repaid the amount you owe. If you terminate your employment with Texas Health, the amount you still owe to Texas Health will be deducted from your final paycheck (this includes any PTO payout you might receive). If your final paycheck is less than the amount you owe, you must repay Texas Health for any remaining balance.

Prodigy Students

Prodigy students who remain in a benefits-eligible status will be eligible for Tuition Reimbursement of up to \$5,250 per year regardless of student status and are eligible to receive vouchers for advance tuition payments.

Plan Changes

The following is important information about this booklet and the Tuition Reimbursement program:

- There are no guarantees that employees' right to participate in the Tuition Reimbursement Plan (the plan) will continue or remain unchanged.
- Texas Health intends to continue the plan, but reserves the right to change it at any time. This includes the right to change the level of benefits provided and the types of employees eligible for benefits.
- Texas Health reserves the sole right to change or terminate all or any part of the plan, at its discretion at any time, either in its entirety or with respect to any covered types of employees. From time to time, you may receive updated information concerning benefit changes.
- No employee of Texas Health is responsible for advising you on the tax effect of your participation in the plan. Because tax laws are complicated and constantly changing, we recommend that you consult a tax advisor if you have questions about how participation in this plan will affect your personal tax situation.
- The plan administrator has the authority to interpret the plan. Any interpretation made by the plan administrator will be conclusive.