 JOHNS HOPKINS JOHNS HOPKINS HEALTH SYSTEM	Johns Hopkins Health System JHHS/JHM Human Resources Manual Educational Policies	<i>Policy Number</i>	HR000
		<i>Effective Date</i>	07/01/2022
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	Tuition / Educational Assistance	<i>Supersedes</i>	NA

This document applies to the following Participating Organizations:

Johns Hopkins Medical Associates

Keywords: reimbursement, tuition

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I. POLICY

The Participating Organizations will invest in the continuing education of its employees by providing a tuition benefit to assist with cost.

II. DEFINITIONS

Approved Educational Institution - Participating Organizations will recognize only accredited post-secondary educational institutions.

Business/Operational Necessity - For the purpose of this policy, business/operational necessity is defined as a degree needed to maintain or enhance skills in current job or another position within the Participating Organizations.


Calendar Year - For the purpose of this policy, a calendar year is in reference to a 12-month period from January 1st through December 31st over which an employee's tuition assistance (Reimbursement/Advancement) received will be tracked to determine if and when the employee has reached \$5,250 for that calendar year.

Courses - Courses for credit, including internet courses, are covered under the policy if such course work leads to a degree. Correspondence courses, certificates, licensures, seminars, conferences and continuing education programs are not covered by this policy.

Fiscal Year - For the purpose of this policy, a fiscal year is in reference to a 12-month period from July 1st through June 30th over which an employee's tuition assistance (Reimbursement/Advancement) received will be tracked to determine when the employee has reached their maximum benefit for that fiscal year. The course start date determines to which fiscal year the application is applicable.

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Full-Time - For the purpose of this policy, an employee who is regularly scheduled to work **36** or more hours per week is considered a full-time employee. (Effective for courses with a start date of 1/1/2019 and later.)

Part-Time - For the purpose of this policy, an employee who is regularly scheduled to work between **20-35** hours per week is considered a part-time employee. (Effective for courses with a start date of 1/1/2019 and later.)


III. ELIGIBILITY

Tuition assistance is available and may be granted, after 90 days of employment (Semesters starting 91 days after hire and later), to full-time employees (regularly scheduled to work 36-40 hours per week) and part-time employees (regularly scheduled to work 20-35 hours per week). Semesters that began prior to the completion of 90 days of employment are not eligible. To receive assistance, employees must pursue a course of study at an approved educational institution, as described further in the Tuition Assistance Policy (HR332); that leads to a degree and meets the criteria of business or operational necessity related to the current position or another position within the Participating Organizations.

In participating in this educational partnership, the employee agrees to a service payback commitment as described further in this policy.

- A. Educational Assistance Benefit
 1. **Tuition Advancement** is available to all undergraduate degree seeking, benefit eligible employees (20 or more hours per week) earning less than \$50,000 annually (\$24.04 hourly).
 2. **Tuition Reimbursement** is available to all degree seeking, benefit eligible employees (20 or more hours per week) including those who missed the deadline for requesting tuition advancement.
- B. Conditions
 1. In signing the tuition assistance application, the employee has signed a legally binding agreement that if the requirements of the policy are not met, the employee will be obligated to repay either through payroll deduction or legal means (via collections or a collection agency) amounts owed for:
 - a. Courses that were paid for by tuition advancement for which the employee did successfully complete the courses and provide the required grade detail as detailed further in the Tuition Assistance Policy. Until these amounts have been repaid, the employee will not be eligible for further tuition assistance benefits.
 - b. Courses that were paid for by tuition advancement, for which the employee did maintain the same regularly scheduled weekly working hours upon which the advancement was calculated. Until these amounts have been repaid the employee will not be eligible for further tuition assistance benefits.
 - c. Courses for which tuition assistance was provided and the employee did not complete the service payback period as a benefit eligible employee as detailed further in the Tuition Assistance Policy.
 2. Satisfactory completion requires:
 - a. A grade of "C" or better for undergraduate courses
 - b. A grade of "B" or better for graduate courses
 - c. A grade of "Pass" in a pass/fail course

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3. The request must be submitted for the full semester (all sessions) listing all courses in one request. Partial requests will not be honored for processing. The only exception is Summer semester, when there are courses starting prior to 7/1 and others starting 7/1 and later. Due to the fiscal year, these courses will be entered as two applications at the same time with the courses starting prior to 7/1 as one request and the courses starting 7/1 and later in another.
4. An employee whose status changes to other than active, working full-time or part-time (20 or more hours per week) will not be eligible for assistance and any amounts advanced must be repaid. (Employees on a LOA, Casual/On-Call, Terminated, Etc.) are not eligible.
5. Any employee who is currently under disciplinary action within 12 months of any academic period or at the time of submission is not eligible for advancement or reimbursement approval/consideration.
6. An employee must correctly submit the complete application within 6 months of the end date of the semester in order to receive reimbursement or 4-6 weeks prior to the start of the semester to receive advancement.
7. An employee will be reimbursed or advanced for the cost of tuition only (excluding fees, books, etc.) less any grants, scholarships, awards discounts, other employer benefits, etc. (excluding loans and benefits paid under the G.I. Bill). If the student is granted an in-state tuition rate, the in-state tuition rate will be used in computation of the benefit, not the out-of-state tuition rate. The Participating Organization will not duplicate reimbursement made by any other agency or institution.
8. Educational Assistance is considered taxable income for amounts received in excess of \$5,250 each calendar year (January 1st- December 31st) as determined by Internal Revenue Service (IRS) guidelines. (<https://www.irs.gov/newsroom/tax-benefits-for-education-information-center>). This is inclusive of educational assistance from other sources.
9. Anyone found to be submitting fraudulent or altered documents will be subject to suspension from the program and appropriate disciplinary action, which may include termination. Any funds received as a result of the fraud will be pursued for repayment and potential legal action (See policy ADMINSEC001).

C. Service Payback

1. An employee receiving tuition assistance (reimbursement or advancement) must agree in advance (as part of the application/approval process) to work for the Participating Organizations for a service payback determined by the amount of tuition assistance received for each individual submission, as detailed below.


Dollars Reimbursed Per Application	Service Payback Obligation Per Application
\$1 - \$5,250	1 Year of service from the last course end date of the application

NOTE: Service payback will be prorated according to the reimbursement schedule, if applicable. The last course end date in the semester's application is used to calculate the prorated repayment.

2. Service Payback Example

- a. *As the employee is working, he/she is fulfilling his/her work commitment for the previous semester. The 1-year work commitment rolls over with each application submitted thereafter. The work commitment period starts after the last day of the semester for each application submitted.*

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3. If for any reason an employee terminates employment with the Participating Organization before completion of the service payback requirement described above, or does not remain an active, benefit eligible employee with regularly scheduled weekly working hours of 20 or more per week throughout the service payback period, the employee must repay all educational assistance amounts provided for the semester(s) for which the service payback was required. The repayment obligation will be prorated to take into account any partial completion of the service payback requirement. **It is the responsibility of the employee to notify the HR Solution Center (tuitionapplications@jhmi.edu / 443-997-5400) of any concerns relating to fulfillment of the service commitment and arrange repayment of the balance prior to separation or status change.** Any outstanding amounts owed at the time of separation or change in status are reported to collections for repayment.
4. By accepting educational assistance, an employee expressly authorizes his or her employer to withhold any repayment amounts required under this Policy, and in accordance with the Maryland Wage Payment and Collection Law, Maryland Annotated Code S 3-503(2) from any amounts owed to the employee (including but not limited to the employee's final pay or PTO pay). If the employee fails to make any required repayment and the Participating Organization takes action to recover the repayment obligation, the employee agrees to pay the fees incurred by the Participating Organization in pursuing recovery.
5. This service payback requirement is not an employment contract and in no way obligates the Participating Organization to provide any future employment to any person. The HR Solutions Center, in its sole discretion, may waive part or all of any repayment requirement in the event of a reduction in force.

IV. PROCEDURES

- A. Employee enters a request via the online system. Once entry via the online system is complete, the employee will print the Tuition Assistance Approval Form generated by the online system. The form must be signed by all persons listed on the form. The signed form and all required supporting documentation must be uploaded to the online system allowing the employee to click Save and Submit for Approval / Save and Submit for Loan Review. (The application must be in the status of Under Review in order to forward for processing.)
- B. Manager/Supervisor will:
 1. Review the employee file for active disciplinary action and determines if approval shall be granted.
 2. Review request and conducts educational development plan, and service payback discussion with the employee.
 3. Approve/disapprove request, then as needed obtain vice president's signature and return the form to the employee.
- C. Employee will upload all required supporting documentation and submit the request via the online enrollment system:
 1. Advancement as early as 6 weeks and no later than 4 weeks prior to the start date of the semester including:
 - a. Tuition Assistance Approval Form, that will be generated by the online system, and must be signed by all persons listed on the form.
 - b. An itemized bill separating the cost of tuition and fees printed from your student portal bearing your full name and URL (www.school.edu...) of the site from which it was printed.
 - c. Your financial aid award summary detailing the type/amount of any aid to be applied to the semester. When there is no financial aid, a letter from the college/university explicitly stating that there is no aid to be applied to your account. Updated detail is required with each semester's submission and a FERPA release must be on file with the college/university authorizing our office to seek clarification in review of your tuition record.
 - d. An enrollment schedule showing the courses and number of credits for which you are enrolled printed from your student portal bearing your full name and the URL of the site from which it was printed.
 - e. A grade report for the previous semester reflecting your final letter grades, printed from your student portal bearing your full name and the URL (www.school.edu...) of the site from which it was printed.

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- f. *Note: Applicants must establish a payment plan at the college/university, and begin making payments, to retain their enrollment until the benefit is applied to their biweekly pay. The Participating Organization does not issue letters to the college/university. To document the pending benefit, you may supply the Tuition Assistance Request Confirmation by clicking on “More” to the left of your application and then “Print Confirmation”. Grades for Advancement are due within one month of the end date. Advancement is paid to the employee and will be applied to their bi-weekly paycheck.*
2. **Reimbursement** at the end of each semester and no later than 6 months following the end date of the semester including:
- A Tuition Assistance Approval Form, that will be generated by the online system, and must be signed by all persons listed on the form.
 - An itemized bill separating the cost of tuition and fees printed from your student portal bearing your full name and URL (www.school.edu...) of the site from which it was printed.
 - Proof of payment in full detailing the payment type (Cash, Check, Credit Card, Loan, Grant, Scholarship, Etc.) printed from your student portal bearing your full name and the URL (www.school.edu...) of the site from which it was printed. Your college/university may offer deferment, however our policy requires payment in full in order to process reimbursement.
 - A grade report reflecting your final letter grades, printed from your student portal bearing your full name and the URL (www.school.edu...) of the site from which it was printed.
 - Note: There is a 4-6 week processing period from the date the correct application is submitted and in the status of Under Review.*
- D. HR Solution Center will review the advancement or reimbursement request. Following the review will either:
- Review applications for processing and approval.
 - Generate a response to the employee for an incomplete or denied application.
 - Process an eligible application within a 4-6 week processing period.
 - Note: Employee should allow four to six weeks for processing of request and application of payment to the biweekly pay and may log into the site to check the status of the application as it is in process.*

V. SPONSOR

Senior Vice President of Human Resources for JHM

VI. REVIEW CYCLE

3 years

VII. APPROVAL

Revision History

Electronic Signature(s)	Date
Inez Stewart Senior Vice President, Human Resources Johns Hopkins Medicine	

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