



Subject: Educational Assistance	Policy #: BEN-005
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Approved By: VP, Human Resources	Effective Date: 11/01/2001

POLICY AND PROCEDURE

SCOPE

This policy applies to all Brooks' workforce members which for the purposes of this policy refers to all directors, officers, managers, employees, and medical staff. Brooks includes the following entities: Brooks Rehabilitation; Brooks Rehabilitation Hospital University Campus; Brooks Rehabilitation Hospital Bartram Campus; Brooks Health Foundation; Brooks Health Development; Brooks Rehabilitation Home Health; Bartram Crossing Skilled Nursing; The Green House Residences; Bartram Lakes Assisted Living; University Crossing Skilled Nursing; Brooks Rehabilitation Clinical Research Center; Brooks Rehabilitation Medical Group; and Brooks Halifax Rehabilitation Services (Corporate HR and Compliance Policies Only).

Any workforce member found to have violated this policy or falsified documentation may be subject to disciplinary action up to and including termination of employment or termination of benefits under this program.

PURPOSE

To be an employer of choice by assisting employees in furthering their education and developmental goals while meeting the goals and key performance indicators of the organization. This assistance is to encourage employee recruitment, development, retention, and engagement.

POLICY

The plan provides eligible employees tuition assistance in support of their continued educational development and job-related capabilities through participation in courses of study at accredited two or four-year colleges and universities and technical/vocational schools. The program of study must be related to the employee's development in their current position or a probable future assignment to the benefit of the organization. All coursework must be approved in advance by the company.

The plan will provide tuition support in accordance with the following guidelines:

- up to \$2,000 per calendar year towards undergraduate coursework
- up to \$3,500 per calendar year for Graduate/Ph.D. coursework
- up to \$5,250 per calendar year for employees enrolled in LPN/RN/BSN/MSN programs
- Payment includes tuition and required textbooks; miscellaneous expenses such as parking, application fees, social dues, athletic fees, etc. are not included in this program

Eligibility

- Full-time and part-time employees who work at least forty (40) hours per pay period

- Employed in an eligible status at least six (6) months prior to the beginning of the term for which they request assistance
- PRNs are not eligible for tuition assistance
- Halifax Joint Venture employees who meet the above requirements are eligible
- Bayonet Point employees are not eligible

PROCEDURE

1. Employee completes and electronically submits *Application for Tuition Reimbursement* and receives all required approvals. Program of study and assistance level will be reviewed and approved first by the employee's department Director and second by Human Resources.
2. Within 60 days of successful completion of the coursework, employee electronically submits via the *Oracle Expense Reporting* function a copy of their signed Application for Tuition Reimbursement, proof of grades, and proof of payment. The name of the employee and school must be printed on the proof of grades and proof of payment.
3. The tuition statement is used to determine the reimbursement amount for courses. Any grant, scholarship, financial aid, and other sources of reimbursement are applied to the bill before calculating the eligible payment. In no event will be the reimbursement amount exceed the amount documented on the school tuition statement.
4. Loan amounts applied to an employee's tuition are eligible for reimbursement under the following guidelines:

In order for loan amounts to be considered as non-taxable educational assistance, the employee will need to provide either proof of payment to the loan servicing provider or the following information:

- Loan servicer's name
- Loan account name
- Current balance
- Required monthly payment amount
- Monthly payment due date

If the employee cannot provide this information, they may still be considered for educational assistance on a taxable basis. Any unsubstantiated loan payments will be paid through Payroll and considered supplemental income and taxed in accordance with IRS guidelines.

5. In order to receive reimbursement for textbooks, the employee must electronically submit receipts showing the textbook name, costs paid for books, and proof of payment. Textbooks covered by loans, grants, financial aid, or other sources of reimbursement, will not be approved for payment under this policy.
6. Employee must submit proof of grades via official grade report or transcript. Employees will only receive reimbursement for courses where they obtain a grade of 'C' or better. If the course is a pass/fail course, the employee must receive a 'pass' to apply for reimbursement.
7. HR will work with Finance to disburse funds requested.

8. Employees terminated for cause or who voluntarily terminate employment prior to course completion, and are not actively employed at the time of reimbursement will not receive funds under this policy.
9. Employees who terminate employment or move into an ineligible status may be required to repay any funds that were received under this program in the twelve (12) months prior.
10. This program is not intended for seminars, workshops, conferences, certification/licensing exams, or prep courses for licensing/certification. Requests of this nature should be directed to the employee's manager and paid from the home department's budget.
11. Any questions related to this policy should be directed to the HR department.

Application for Tuition Reimbursement

**Annual limits - \$2,000 for undergraduate; \$3,500 for graduate programs;
\$5,250 for approved Nursing Programs**

Employee Name		EE ID
Address for Reimbursement Check at end of semester		Dept. Name (Work Location)
Department Code	Job Title	Status (FT/PT)
Name of College/University/Educational Institution		Expected Graduation Date

CHECK AND COMPLETE THE APPROPRIATE PROGRAM INFORMATION

Degree Program	<input type="checkbox"/> AA/AS <input type="checkbox"/> BA/BS <input type="checkbox"/> MA/MS <input type="checkbox"/> MBA <input type="checkbox"/> Other Graduate	Undergraduate Major :
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Career/Education Goal:

COURSE REGISTRATION INFORMATION:

Term beginning date: _____ Term ending date: _____

Course Number	Course Name	Hours	Cost	Grade Received	Amount Reimburse
TOTALS				TOTAL REIMBURSEMENT	

REPAYMENT: An employee receiving reimbursement is expected to stay employed for 12 months following the last tuition reimbursement payment. If an employee terminates employment, for any reason, the tuition reimbursement payment(s) may be collected from the employee on a pro-rated basis.

Employee Signature _____ Date _____

Director Signature _____ Date _____

NOTE: This form must be filled out PRIOR to registration and approved by your Department Director. Reimbursements are made only when courses are pre-approved and receipts and grades are turned into Human Resources per the procedures outlined in this policy.