



POLICY & PROCEDURE MANUAL

SECTION: 300 - PERSONNEL

SUBJECT: TUITION REIMBURSEMENT

POLICY:

It is the policy of Jackson Health System (JHS) to encourage all employees to improve their effectiveness in their job performance and to prepare themselves for future career opportunities with the JHS. Therefore, eligible full-time and part-time employees may receive reimbursement toward tuition at an accredited educational institution or certification reward program according to the conditions established in this policy.

The tuition reimbursement program and budget are reviewed annually and are subject to change based on financial reasons and/or when in the best interest of Jackson Health System.

I. ELIGIBILITY

- A. The following eligibility criteria apply to employees who wish to participate in the program:
 - 1. Employees must be in pay status during the courses for which tuition reimbursement is requested.
 - 2. Employee's most recent performance evaluation must reflect a "meets standards" or higher overall evaluation rating. It is the responsibility of the supervisor to review this evaluation prior to signing the supervisor signature form tuition reimbursement application.
 - 3. In addition to the employee's supervisor, the employee's administrator or director must sign the application.
- B. Full-time employees and employees in grant funded positions must have a minimum of six (6) months continuous employment to be eligible for participation.
- C. Regular part-time employees must have completed 1040 hours of employment and receiving benefits to be eligible for \$2,500 per fiscal year.

II. STANDARD TUITION REIMBURSEMENT

- A. Employees will be reimbursed only for the courses necessary to earn one Bachelors Degree, or the courses necessary to earn one Masters Degree, and one (1) Doctoral Degree.

Employees must successfully complete courses to qualify for tuition reimbursement. Successful completion is defined as receiving a minimum grade of "C" in undergraduate and "B" in graduate courses. Successful completion of other programs, such as certificates or NCLEX exams or any other approved program is required in order to receive tuition reimbursement.



POLICY & PROCEDURE MANUAL

SECTION: 300 - PERSONNEL

SUBJECT: TUITION REIMBURSEMENT

B. Reimbursement Limits

Reimbursement for approved expenses for full-time employees is limited to actual cost or \$5,000, (\$2,500 for regular part-time employees) per Jackson Health System fiscal year. Reimbursement is subject to the following provisions
Note: Jackson Health System fiscal year begins October 1st and ends September 30th. All reimbursement is determined by the course end date.

EMPLOYMENT OBLIGATIONS

EMPLOYMENT OBLIGATION:

- All employees receiving reimbursement under this program are required to remain in an active employment status of Jackson Health System for a period of one (1) year from the latest payment reimbursement date or will be required to repay Jackson Health System in full from regular pay and/or leave payouts as described in the tuition reimbursement agreement signed by each applicant.

C. Discounts, State Subsidies, and Grants

Employees are required to take advantage of any discounts or other subsidies that may be available to them which would cover expenses qualifying for tuition reimbursement.

JHS will provide tuition reimbursement only to the extent that expenses are not covered by discounts, subsidies, grants, scholarships, or other services; and any such reimbursement is subject to the provisions in paragraph 11.B.

D. Reimbursable Courses:

1. All courses required in pursuit of a degree at an accredited school or courses in an online program which will prepare the employee for a higher position or a change in career field within Jackson Health System.
2. Health care related courses in accredited technical or trade schools leading to certification in a field that will prepare the employee for a higher position or a change in career field within Jackson Health System.
3. Courses at an accredited university, college, trade, business, or vocational school (not in pursuit of a degree or certificate) that will enhance skills in current classification or prepare the employee for a higher position or change in career field within Jackson Health System.
4. Prerequisite courses outside the major course of study (e.g., completion of an



POLICY & PROCEDURE MANUAL

SECTION: 300 - PERSONNEL

SUBJECT: TUITION REIMBURSEMENT

undergraduate statistics course in order to be allowed to register for the graduate course). Requests for approval of these courses must be submitted with written justification from the educational institution.

DATE: 04/2013

| PAGE 2 OF 4



POLICY & PROCEDURE MANUAL

SECTION: 300 -PERSONNEL

SUBJECT: TUITION REIMBURSEMENT

5. NCLEX exams for certification.
6. Recertification Fee
7. Licensure Fee
8. Correspondence courses
9. Doctoral or law degrees
10. Fees for online courses
11. Contact Hour Courses (formerly referred to as CEU courses, preferred by Florida State Board of Nursing).

Any questions regarding whether a degree, course, certificate, etc. qualifies for reimbursement will be referred by Tuition Reimbursement to the appropriate division director.

E. Non-Reimbursable Costs

1. textbooks
2. laboratory fees
3. service fees
4. admission tests
5. activity fees
6. out of state resident fees
7. membership fees
8. registration fees
9. course audits
10. courses offered by Jackson Health System (e.g. ACLS)
11. credits in excess of, or courses not required by a program curriculum (degree/certificate seeking students only)

III. PROCEDURE

- A. All participating employees will sign a statement (supervisor's signature form) acknowledging that they understand and will adhere to the policies and procedures of the program.
- B. Applications, instructions and requirements can be found on the Jackson Intranet home page or on the internet at www.jacksonhealth.org under the section for employees.



POLICY & PROCEDURE MANUAL

SECTION: 300 -PERSONNEL

SUBJECT: TUITION REIMBURSEMENT

- C. Applications must be received no later than two weeks before the start of the course, certificate program, etc. for which reimbursement is being requested.
- D. First time applicants need to submit an acceptance letter, degree curriculum from the institution in addition to supervisor's signature form and receipt of payments. All final grades submitted after courses end MUST be the originals or have a certified stamp showing accreditation.
- E. Documentation (original grades and/or copies of certification) required for reimbursement must be received by the Tuition Reimbursement Office within 45 days of the course, test, certificate program, etc. end date. Failure to submit these documents on time will result in forfeiture of tuition reimbursement benefits for the applicable courses

IV. CLASS SCHEDULE

Classes are to be scheduled outside of working hours unless the employee's administrator or director of patient care services approves the use of accumulated annual, personal, or holiday time.

V. INCOME TAX DEDUCTIONS

Jackson Health System will comply with IRS rules regarding taxation of tuition reimbursement proceeds. This rule states that tuition reimbursements are non-taxable for amounts received up to \$5,250 per calendar year.

VI. DEFERRED PAYMENT AGREEMENTS

Jackson Health System does not enter into and/or endorse deferred payment agreements. Employees are solely responsible for deferred payment arrangements with their respective school (s).

APPROVED:

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