



Policy /Procedure Document	
Category/Source:	Beacon Administration
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Policy Owner:	Tracee Siade - Jones
Required Approvals:	Chief Human Resource Officer and Entity Presidents

TITLE:	Section 127 Tuition Reimbursement/Scholarship Program
SCOPE:	All Beacon Health System entities
PURPOSE:	Beacon's Section 127 Tuition Reimbursement/Scholarship Program is intended to provide monetary assistance to eligible Associates in their pursuit of approved educational activities and professional development for degrees which Beacon employs.
POLICY/PROCEDURE:	<p>PAYMENT AMOUNTS: The following are the tuition payment and scholarship payment amounts:</p> <p>a. Full-time, non-bargaining unit Associates, assigned to 70 or more hours per pay period and who have completed 90 days of employment with Beacon, may receive up to 100 percent reimbursement to a maximum of \$2,500 per calendar year for tuition reimbursement. Part-time, non-bargaining unit Associates, assigned to 32 to 69 hours per pay period and who have completed 90 days of employment with Beacon, may receive up to 100 percent reimbursement to a maximum of \$1,250 per calendar year for tuition reimbursement.</p> <p>b. Full-time Associates and regular part-time bargaining unit Associates, who have completed the probationary period, may receive the amount of tuition reimbursement as outlined in the bargaining agreement.</p> <p>c. Any bargaining unit or non-bargaining unit Associate, regardless of assigned hours per pay period, will be eligible to apply for any scholarship, which is applicable to the Associate's field of study, offered through Beacon. The amount of annual scholarship funds available to each eligible Associate cannot exceed the annual IRS maximum minus the amount the Associate has received in Tuition Reimbursement.</p> <p>d. The amount of monies each Associate receives in combination for scholarship and tuition reimbursement cannot exceed the annual Internal Revenue Service's Section 127 maximum. The maximum annual maximum limit is currently \$5,250.</p> <p>PAYMENTS INCLUDED: The following apply to tuition reimbursement:</p> <p>a. Tuition for courses taken through recognized and/or accredited vocational schools, trade schools, secondary schools, colleges, or universities will be reimbursed. Additionally, generally, such costs as books required for the course, technology fees, activity fees, lab fees, nursing clinic fees will be reimbursed.</p> <p>b. Reimbursement for non-academic credit courses, where Continuing Education Credits (CEUs) are earned, will be considered under this program.</p>

PROCEDURE:

When an Associate desires tuition reimbursement, the Associate must:

- a. Ensure that he/she is qualified and accepted for enrollment at the educational institution. Receive approval from his/her Department Manager or Director prior to enrolling in the course. The Department Manager or Director will return the signed form to the Associate.
- b. Enroll in and complete all courses with a passing grade of "C" or higher, for which reimbursement will be requested.
- c. Following successful completion of the course(s) with a grade "C" or higher, complete the Tuition Reimbursement Application, attach your grade slip (must identify you as the student of the grade), and all itemized paid receipts for which reimbursement is requested.
- d. Send the completed, signed application to Human Resources, as soon as the course is completed, for payment. **Incomplete applications will be returned to the Associate.** The final deadline for submitting completed forms to Human Resources is July 1st of the year in which the Associate takes his/her Spring course(s). The deadline for Summer and Fall courses is December 20th of the year immediately following the year in which the course was taken.

When an Associate applies for assistance through one of Beacon's scholarship funds, the Associate must:

- a. Submit the completed scholarship application form by the deadline indicated on the form.

REPAYMENT OF TUITION:

Associates will be expected to repay Beacon an amount of tuition reimbursement when they terminate employment in less than one year following the completion of the course or courses. The Associate must repay the full amount of the tuition assistance provided.

EXCLUSIONS:

The following exclusions apply to tuition reimbursement:

- a. Will not be provided for attainment of certification. (These funds, if available and approved, will be provided through the department of assignment or through certification reimbursement).
- b. Will not be provided for cost of deposits, transportation, parking fees, late fees, deferment fees, registration fees, and the like.
- c. Will not be provided for courses that have been paid for and/or reimbursed under another funding source (e.g. scholarship, Pell Grant, etc.).

The following exclusion applies to scholarship monies:

- a. Will not be provided for courses that have been paid for and/or reimbursed under another funding source (e.g. tuition reimbursement, certification reimbursement, Pell Grant).

Document Revision History:

Review Date: July 24, 2013	Revised Date: July 24, 2013	Reviewed/Revised By: S. Eller CHRO	Summary of Changes: Combination of policy MHS/EGH affiliation

SIGNATURES OF APPROVAL:

Date Signed	Signature	Name	Title
_____	_____	Steve Eller	Chief Human Resource Officer

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