

## Beaumont Health Tuition Assistance benefit at-a-glance

<b>What is the purpose of Tuition Assistance?</b>	To provide financial assistance — in the form of tuition reimbursement — to employees who are enhancing their knowledge and skills by earning a higher education degree or vocational/technical degree in a Beaumont Health job-related field.
<b>Who is eligible to apply for Tuition Assistance?</b>	To be eligible, you must be an active full-time or part-time employee (budgeted at 20 hours or more per week) or a contingent nursing assistant pursuing a nursing degree and continuously working 20 hours per week. You may apply for Tuition Assistance on or after the first of the month following your date of hire.
<b>What is the application process?</b>	<p><b>Step 1:</b> You must complete the <u>Tuition Assistance Request Form</u> (available on the Beaumont Health intranet under the “policy” tab).</p> <p><b>Step 2:</b> Submit the form, along with a course description and schedule, to your manager for acknowledgment before enrolling for the course.</p> <p><b>Step 3:</b> Once acknowledged by your manager, submit the form and your class schedule for final approval to the Benefits department before the start of the course. A determination will be made, and you will be provided with approval/denial within 14 days from receipt in the Benefits department. You must obtain approval from the Benefits department prior to the start of the course to be eligible for reimbursement.</p>
<b>What is the maximum reimbursement amount?</b>	<ul style="list-style-type: none"> <li>• Full-time employees: \$3,000 per calendar year</li> <li>• Part-time employees: \$1,500 per calendar year</li> <li>• Contingent nursing assistants: \$1,500 per calendar year</li> </ul>
<b>What type of commitment is required by me in return?</b>	<p>In return for BH’s financial investment, you are asked to provide a 24-month service commitment. This means if you voluntarily end employment with Beaumont Health within 24 months of receiving Tuition Assistance, you would be responsible for repayment of the full amount provided within that 24-month period. Note: the exception is if you voluntarily end employment because a position within the area of the degree is not available to you anywhere throughout Beaumont Health.</p> <p>If you are an eligible contingent nursing assistant, you must agree to continuously working 20 hours per week for a period of two years after receiving reimbursement. If you voluntarily reduce your work schedule or terminate employment within two years of receiving reimbursement, you will be required to repay Beaumont Health the full amount of any tuition reimbursements received during the 24-month period preceding your reduced work schedule or termination.</p>
<b>What courses are eligible for reimbursement?</b>	<p>Courses must be:</p> <ul style="list-style-type: none"> <li>• taken at an accredited community college, junior college, college, university or vocational/technical school</li> <li>• relevant to a position within BH</li> <li>• part of the curriculum for a specific degree</li> </ul>
<b>What expenses are NOT reimbursable?</b>	<p>Examples include:</p> <ul style="list-style-type: none"> <li>• seminars, workshops, licensing, relicensing, training classes and certifications or re-certifications</li> <li>• entrance exams, books, supplies, registration and other miscellaneous fees and travel expenses</li> <li>• elective courses not part of the curriculum</li> </ul> <p><i>Note: Refer to the policy for complete list of ineligible expenses.</i></p>



Is there an alternative way for professional licenses and certifications to be reimbursed?

Professional certification and licensing fees and expenses are not eligible for reimbursement under the Tuition Assistance program. There is work being done separately to develop one system-wide certification reimbursement policy and process. Recognizing that there is considerable difference in how the founding organizations currently reimburse for certifications and continuing education credits, such as eligibility rules, reimbursement amounts, covered CEUs and certifications, we will extend the reimbursement of certifications and CEUs through Dec. 2016 under the founding organizations' existing rules and procedures.

What are the requirements to earn the reimbursement?

You must submit the following to the Benefits department within 90 days of completing the course:

- documentation (i.e., transcript) showing you have successfully completed the course with a passing grade as follows:
  - *Undergraduate course*: Receive a 2.0 ("C") or better on a 4.0 scale
  - *Graduate course*: Receive a 3.0 ("B") or better on a 4.0 scale
 If grades are not normally awarded, a statement of satisfactory completion — such as a "pass" on a pass/fail course — will be accepted.
- receipt or statement showing the amount of tuition paid

How will I be reimbursed?

Within 30 days (or two pay periods following the submission of appropriate paperwork), the approved reimbursement will be included in your paycheck.

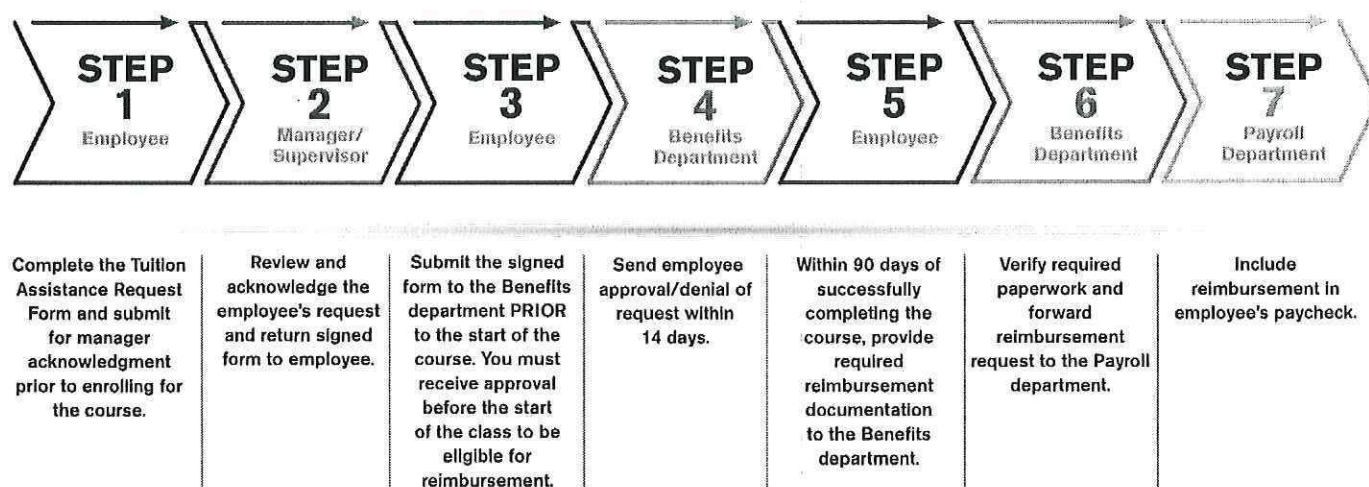
Who can I contact with questions?

Please contact your Benefits department:

**Adriene Crockett-Levingston**: 248-423-3188 / email: [Adriene.Crockett-Levingston@beaumont.org](mailto:Adriene.Crockett-Levingston@beaumont.org)

**Andrea Jezak**: 248-888-2604 / email: [Andrea.Jezak@beaumont.org](mailto:Andrea.Jezak@beaumont.org)

**Angela Samyn**: 313-586-5899 / email: [Angela.Samyn@beaumont.org](mailto:Angela.Samyn@beaumont.org)



Overview of the application and reimbursement process

## Beaumont Health Tuition Assistance FAQs

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### WHY CHANGE

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**Why is the Tuition Assistance benefit changing?**

As we move forward as one organization, it is critical that we have one consistent pay and benefits program— which includes Tuition Assistance — for all employees across Beaumont Health. This helps to ensure fairness and makes it easier for employees to move across BH to take on new, exciting career opportunities.

**What did you take into account when developing the new Tuition Assistance benefit?**

We looked at what was in place today at each founding organization and asked independent experts to look at the programs offered by similar health care organizations and businesses to see what is commonly provided and valued in the marketplace. Leader and employee input (including input from the employee pay and benefits survey from January) also helped shape the benefit.

**Is this change an improvement over the benefit we currently have?**

Yes, this change reflects an overall increased financial investment by Beaumont Health and is an enhanced benefit from what has been offered by all three founding organizations. Each organization had its own version of tuition assistance, but overall, the new program:

- increases the reimbursement amount
- expands eligibility for reimbursement

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### ELIGIBILITY/BENEFIT OVERVIEW

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**Who is eligible to apply for Tuition Assistance?**

To be eligible, you must be an active full-time employee (budgeted to work 40 or more hours per week) or part-time employee (budgeted to work 20 or more hours per week) of BH. Nursing assistants working 20-plus hours per week are also eligible. You may apply for Tuition Assistance on or after the first of the month following your date of hire. Employees covered under bargaining agreements should refer to their respective agreement.

**What can I use this benefit for?**

You can use this benefit to obtain financial assistance, in the form of tuition reimbursement, to take courses from accredited institutions. Tuition Assistance is intended to support skill development in your current job and enhance knowledge and skills for career growth and future promotional opportunities at BH. Tuition assistance is available for clinical and nonclinical courses.

**What is the maximum reimbursement I may receive under the Tuition Assistance benefit?**

The maximum reimbursement for eligible employees is:

- *Full-time employees:* \$3,000 per calendar year
- *Part-time employees:* \$1,500 per calendar year
- *Contingent nursing assistants:* \$1,500 per calendar year



**Do I have to pay out-of-pocket for approved courses/programs?**

Yes, Tuition Assistance is designed to provide for reimbursement of qualified expenses only upon the successful completion of an approved course or program. There are no "advances" provided.

**What courses will be covered?**

There are six criteria that must be met for a course to be covered under the Tuition Assistance program:

1. The degree must be related to a BH job and be required for the completion of that degree program.
2. The course must be offered by an accredited higher education or vocational/technical institution.
3. The course must be reviewed and acknowledged by your manager/supervisor prior to enrolling in the course and approved by the Benefits department prior to the start of the course.
4. You must show proof of successful completion as follows:
  - *Undergraduate course:* Receive a 2.0 ("C") or better on a 4.0 scale
  - *Graduate course:* Receive a 3.0 ("B") or better on a 4.0 scale

If grades are not normally awarded, a statement of satisfactory completion — such as a "pass" for a pass/fail course — will be accepted.
5. Courses must not conflict with your work schedule.
6. Given BH's financial investment and commitment, participants must also show a level of commitment by agreeing to a 24-month service commitment.

**Is this benefit only for clinical courses/degrees?**

No, Tuition Assistance is also available for nonclinical and technical courses/degrees.

**Can I use Tuition Assistance for earning a certificate or license?**

Certification/recertification and licensing fees and expenses are **not** eligible for reimbursement under the Tuition Assistance benefit. There is work being done to develop one system-wide certification reimbursement policy and process. Recognizing that there is considerable difference in how the founding organizations currently reimburse for certifications and continuing education credits, such as eligibility rules, reimbursement amounts, covered CEUs and certifications, we will extend the reimbursement of certifications and CEUs to Dec. 31, 2016 under the founding organization's *existing* rules and procedures. During this period, employees seeking certification and licensing reimbursement should be referred to the Benefits department for assistance.

**Can I use Tuition Assistance for a single class to improve a specific skill, such as a computer class?**

No, you must be working toward a BH job-related degree to be eligible for reimbursement under Tuition Assistance. Tuition Assistance will not reimburse for single courses unrelated to a degree curriculum.

**I want to improve my computer skills. Will this be eligible for reimbursement through Tuition Assistance?**

The course will be eligible only if it is part of an eligible curriculum toward earning a degree. Tuition Assistance will not reimburse for single courses unrelated to a degree curriculum.

**Can I take time off work to attend classes?**

To the extent possible, you should not take a course(s) that would require you to miss work during your regularly scheduled work hours. As part of the application process, you must confirm your class schedule with your manager/supervisor before submitting it to the Benefits department.

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## APPLICATION PROCESS

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**Do I need to apply for Tuition Assistance?**

Yes, you must apply and receive approval **before** the start of the course. Specifically, you must complete and submit the Tuition Assistance Request form along with a course summary and schedule to your manager **before enrolling**. Once your manager has acknowledged the request, submit the signed form and your class schedule to the Benefits department for final approval **before** the *start of the course*.

**I'm concerned my class may start before I can get all the necessary approvals. What should I do?**

As we transition to this new benefit and process, we are willing to work with employees on the timing if their class start date is in conflict with the regular approval timeframes. Please notify your supervisor and the Benefits department as soon as possible and explain the situation.

**Do I need to apply for Tuition Assistance each semester?**

It is an annual calendar year benefit, but you will need to complete and submit a Tuition Assistance Request form prior to the start of each semester you plan to utilize this benefit.

**How do I apply for reimbursement of certifications or licenses?**

Reimbursement of these expenses is not covered under Tuition Assistance. However, we will extend the reimbursement of certifications and CEUs through Dec. 31, 2016 under your founding organization's existing rules and procedures. During this period, employees seeking certification or licensing reimbursement should be referred to the Benefits department for assistance.

**How does the 24-month service commitment work?**

We believe Tuition Assistance reflects a mutual commitment on the part of both BH and the employee. In return for Beaumont Health's financial investment in your growth and development, you are asked to commit to applying that added knowledge and skill within our organization. Therefore, if you voluntarily end employment with BH within 24 months of receiving any reimbursement, you will be responsible for repaying that benefit amount.

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## REIMBURSEMENT PROCESS

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**How do I get reimbursed for classes?**

You must submit proof of payment to the Benefits department (such as an itemized receipt), as well as a copy of your official grade report. Your reimbursement will be included in your regular paycheck. If you currently have your paychecks direct deposited, your reimbursement also will be done through direct deposit.

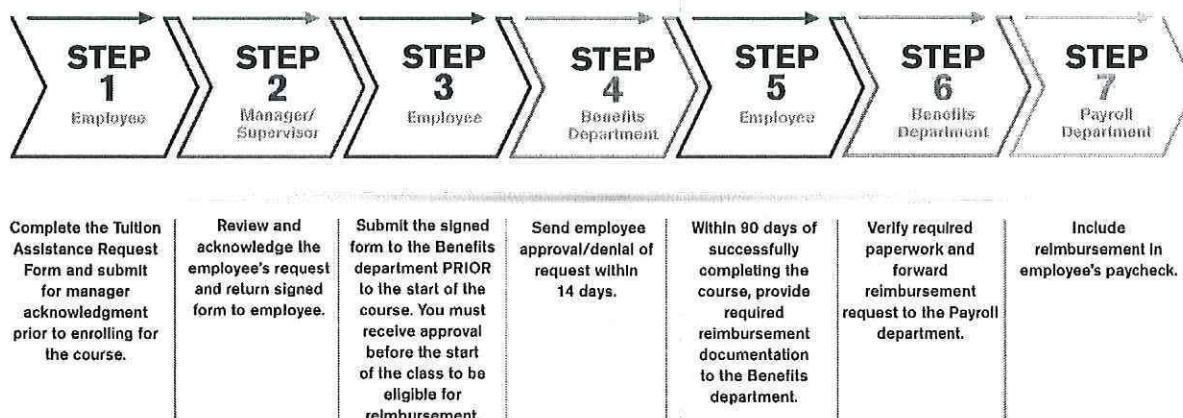
**Is this benefit taxed?**

Tuition Assistance benefits are regulated by the IRS. Most benefits are exempt from taxation. Graduate-level, degree-related tuition benefits, including tuition (matriculation fees, if applicable) up to \$5,250 in a tax (calendar) year are excluded and are not reported as income. Since the maximum reimbursement is \$3,000 per year — which is under the tax threshold — this benefit will not be taxed.



### How does the whole Tuition Assistance process work?

Below is a summary of the application and reimbursement process:



### Under what circumstances would I be required to repay a reimbursement?

If you do not honor the 24-month service commitment you would be required to repay the reimbursement amount. For example, if upon graduation, a position is made available to you within the organization but you choose to leave employment with BH instead, you would be required to repay the full amount of reimbursement awarded to you within that 24-month period.

### Is there an exception to the repayment requirement?

If you voluntarily leave BH because of a serious illness or if there is not a position within the area of the degree available to you anywhere within BH at that time, you would not be responsible for repaying the reimbursement.

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## VARIOUS SCENARIOS

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**I am already enrolled in a degree program. Are my current courses eligible for reimbursement under this new Tuition Assistance benefit?**

No, the new Tuition Assistance benefit is designed for courses starting after Aug. 1, 2016.

**I have received the maximum reimbursement under the current Tuition Assistance policy, but now that more reimbursement is being offered, can I apply for that additional amount, up to the new annual maximum?**

Yes, you can apply for additional reimbursement up to the new maximum for courses **starting after** Aug. 1, 2016.

**Can I apply for reimbursement for a class I already took?**

No, the new benefit cannot be applied to classes taken prior to Aug. 1, 2016.

**What happens if I don't pass a class?**

There will be no reimbursement if a grade of 2.0 or higher is not achieved for undergraduate courses, or 3.0 or higher for graduate courses.

**What if I can't get into the class I planned on, change my mind and take a different class or decide not to take a class at all?**

If there is a class change, you will need to complete and submit a new Request Form and indicate that it is a correction. You should then submit the new form to the Benefits department as soon as you know of the change. If you will not be taking a class that was pre-approved, you can cancel your application at any time before completion. It is your responsibility to withdraw from the class(es) within the required academic timelines to avoid incurring additional charges. Tuition Assistance will not cover such expenses.

**If I participate in the BSN Nursing Education Assistance program, will I be eligible to participate in the Tuition Assistance program?**

Yes. Employees may apply for tuition reimbursement for required non-nursing courses while receiving education assistance under the terms of the BSN Nursing program.

**Where can I get more information about the Tuition Assistance benefit?**

Please refer to the [Tuition Assistance Policy](#), found on the BH intranet under the Policies tab, or contact your Benefits department:

**Adriene Crockett-Levingston:** 248-423-3188 / email: [Adriene.Crockett-Levingston@beaumont.org](mailto:Adriene.Crockett-Levingston@beaumont.org)

**Andrea Jezak:** 248-888-2604/ email: [Andrea.Jezak@beaumont.org](mailto:Andrea.Jezak@beaumont.org)

**Angela Samyn:** 313-586-5899 / email: [Angela.Samyn@beaumont.org](mailto:Angela.Samyn@beaumont.org)



**Beaumont****Tuition Assistance Request Form****\*Please Note:** Both pages of this form must be submitted prior to the start of the semester. **SITE LOCATION:** **PLEASE PRINT: ALL FIELDS MUST BE FILLED IN TO PROCESS YOUR APPLICATION**

Employee ID	Last Name	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Home Address	City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Home Phone	Cell Phone	Work Phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Hire Date	Department Job Title	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time	<input type="checkbox"/> Non-Union <input type="checkbox"/> Union	<input type="checkbox"/> Contingent
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College/University	Major Field of Study
<input type="text"/>	<input type="text"/>

Highest Degree Presently Held	Degree Seeking	<input type="checkbox"/> Associate <input type="checkbox"/> Bachelor	<input type="checkbox"/> Master <input type="checkbox"/> Doctorate	<input type="checkbox"/> Other (Please Explain)
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<b>TERM</b> <input type="checkbox"/> Winter <input type="checkbox"/> Spring <input type="checkbox"/> Summer <input type="checkbox"/> Fall	<b>HR USE ONLY</b> Business Unit <input type="text"/> Department <input type="text"/>
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FULL COURSE NAME	COURSE NUMBER	CREDITS	TUITION (PER CREDIT)	GRADE
1				
2				
3				
4				

Course Start Date	Course End Date
<input type="text"/>	<input type="text"/>

Did you receive or do you expect to receive financial assistance from any of the following? Check ones that apply.

☐ Federal Pell Grant
 ☐ GI Bill
 ☐ University Scholarship
 ☐ Oakwood Scholarship
 ☐ Other (Please Describe)

I hereby certify that all of the information I have provided as part of my application for tuition assistance is true, accurate and complete. I have not knowingly withheld any facts or circumstances that would adversely affect my application. I understand that any falsification, misrepresentation or willful admission of facts may result in suspension of this benefit.

I understand that should I terminate employment with Beaumont Health prior to the completion of the semester, I will forfeit my rights to reimbursement of education expenses.

Note: Submitting this form is NOT a guarantee of approval. After reviewing this form, you will receive an approval/denial letter.

**EMPLOYEE SIGNATURE****DATE****EMPLOYEE'S DEPARTMENT MANAGER/DIRECTOR SIGNATURE****DATE**



## TUITION ASSISTANCE AGREEMENT

1. I understand that if I voluntarily terminate my employment within 24 months of receiving tuition reimbursement pursuant to the Tuition Assistance Policy, I must repay Beaumont Health the full amount of tuition assistance paid to me within that 24-month time period.
2. I hereby agree and authorize my employer to withhold all or a portion of the repayment from any wages, compensation or other payment due to me upon termination of my employment. I understand that such withholding may equal the entire net amount of my final paycheck and/or the entire amount any other payment due to me.
3. If the withholding described in paragraph 2 does not fully repay the amount I owe, I agree to make full repayment no later than 30 days after I terminate my employment unless alternative payment arrangements are made and agreed to in writing signed by me and Beaumont Health.
4. I understand that I may revoke this authorization at any time upon prior written notice to the Benefits department.
5. I understand that Beaumont Health hereby reserves the right to pursue all legal and equitable remedies available to it in order to collect any amount I owe.

**I have reviewed the above terms and voluntarily agree to the terms as stated above.**

**EMPLOYEE ID#:**

**SIGNATURE**

**PRINT NAME**

## TUITION ASSISTANCE ELIGIBILITY

***The objective of tuition assistance is to provide financial assistance for educational purposes to eligible Beaumont Health employees who continue their education through an adult education program or accredited institution to complete a degree or vocational/technical program in a Beaumont Health job-related field.***

### ELIGIBILITY

- Employees will be eligible to apply for tuition reimbursement on the 1st of the month following their date of hire as a full or part time employee, and be actively working as a full or part time (0.5 FTE or greater) employee at the time the course begins and ends. The level of tuition reimbursement will change for a full time employee who transfers to part time status and for any employee who transfers to contingent status during a semester or term.
- Full time employees are eligible for a maximum tuition reimbursement of \$3,000 annually. Part-time employees are eligible for a maximum tuition reimbursement of \$1,500 annually.
- Employees must attain a **C** or better grade to receive reimbursement for undergraduate courses and a **B** or better grade for graduate courses (C- or B- do not meet the requirements). If an institution uses a Pass/Fail grade system, the employee must receive a "Pass".

### THE FOLLOWING EXPENSES ARE NOT REIMBURSABLE

- |  |   |
|--|---|
| <ol style="list-style-type: none"> <li>1. Seminars, workshops, certifications, re-certifications, licensing, re-licensing, or training classes.</li> <li>2. Entrance exams or preparation courses for entrance and license exams.</li> <li>3. Courses retaken and previously reimbursed.</li> <li>4. Any books, supplies, and deposits.</li> </ol> | <ol style="list-style-type: none"> <li>5. Any registration fees, application fees, lab fees, or parking fees.</li> <li>6. Any travel expenses.</li> <li>7. Any elective courses that are not part of the curriculum.</li> <li>8. Courses taken on an "audit" basis.</li> <li>9. Any costs prior to becoming eligible under this policy or funded through department budgets.</li> </ol> |
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### PROCEDURES: PRIOR TO SEMESTER STARTING:

- ✓ **Complete the tuition reimbursement application in full and submit it along with a copy of your course schedule before the start date of the course/program:** Email: [tuitionreimbursement@beaumont.org](mailto:tuitionreimbursement@beaumont.org) or Fax: 248-423-2564.
- ✓ If you have any questions, please contact Angela Samyn at 313-586-5899, email : [Angela.Samyn@beaumont.org](mailto:Angela.Samyn@beaumont.org); Adriene Crockett-Levingston at 248-423-3188, email [Adriene.Crockett-Levingston@beaumont.org](mailto:Adriene.Crockett-Levingston@beaumont.org); or Andrea Jezak @ 248-888-2604, email [Andrea.Jezak@beaumont.org](mailto:Andrea.Jezak@beaumont.org).

### WITHIN 60 DAYS OF COMPLETING THE SEMESTER/COURSE:

- ✓ Submit the following information to the Corporate Human Resource Department:
  1. A statement of charges showing: Class(s) name; a listing of charges; and how the bill was paid. *If you received financial assistance, you will need to submit verification of your award, i.e. grants, scholarship, loans, before your payment can be processed.*
  2. Proof of passing grade.

### TUITION REIMBURSEMENT PAYMENT:

- ✓ The Benefits Administration representative will process the paperwork and submit a request for payment through your paycheck to the Payroll Department. Please allow 4-6 weeks for processing and reimbursement.

**PLEASE REVIEW THE TUITION ASSISTANCE POLICY FOR MORE DETAIL.**