

# **Carilion Clinic Tuition Advancement Education Assistance Benefit Guidelines**

## **Purpose**

The purpose of the Benefit is to provide employees with an opportunity for professional growth and development by advancing tuition costs for employees who are seeking a degree or certification that prepares them for a Carilion Clinic designated position. Under the Benefit, Carilion Clinic employees may pursue a degree or certification at Jefferson College of Health Sciences (JCHS) or the Carilion Clinic Medical Center School of Clinical Laboratory Sciences.

## **Rights Reserved by Carilion Clinic**

Carilion Clinic reserves the right to make changes in the guidelines, without prior notification as it relates to programs, cost, general information or any regulatory policies and procedures. Carilion Clinic reserves the right to deny admission to any applicant applying for the Tuition Advancement Program when it is determined to be in the best interest of Carilion Clinic.

## **Eligibility Criteria**

To be eligible for admission to the Carilion Tuition Advancement Program, employees must meet the following criteria:

- Be in a regular part-time (24 hours per week) or full-time position for at least 6 months prior to the first day of classes.
- Have Meets or Exceeds standards on their most recent performance evaluation.
- Have no active Type II corrective actions.
- Be accepted at the Carilion approved educational program.
- Apply for eligible state financial aid.
- Sign and agree to the service commitment.

## **International Employee/Students**

An international employee must have applied for and received a change in his/her visa status to qualify for the Carilion Clinic Tuition Advancement Benefit. This change in immigration status must be documented and allow the employee to work regular part-time or full-time for the duration of the required service commitment.

## **Application Process**

Employees will be contacted by the Human Resources Education Benefits Specialist for an initial interview to review the Benefit, criteria, requirements, and expectations. Interviews will not be scheduled until the required paperwork has been received, the employee has been accepted to the approved program at JCHS and applied for VTAG through Financial Aid at JCHS. The following must be completed and submitted to Human Resources prior to the initial interview:

- Tuition Advancement application (with manager approval)
- Service Commitment
- Release Agreement
- Agreement to Terms and Conditions

Employees must return the completed college application to the Admissions office at JCHS.

Employees must return the completed VTAG and any other financial aid applications to the Financial Aid office at JCHS.

Tuition Advancement applications will not be submitted for approval until the employee has been accepted at the educational institution and completed all necessary requirements.

### **Appeal process**

If an employee feels he/she should be considered for an Educational Assistance benefit after being denied approval, the employee may submit a written appeal to the Education Benefits Specialist explaining why the employee's application should be approved. The appeal must be received within 60 days of the denial of the original application.

The Educational Assistance Benefit Review Committee will then take the appeal into consideration. A decision will be made and the employee will be notified within 60 days from receipt of the appeal. The decision of the committee will be considered final.

### **Number of Hours an Employee Must Work Per Pay Period while Enrolled in Tuition Advancement**

- While enrolled in Tuition Advancement employees/students must work a minimum of 16 hours per pay period.
- Exception: Employees who enroll in a second Tuition Advancement sponsored program before fulfilling the service commitment for the first Tuition Advancement sponsored program, will be required to meet at least the minimum work requirements of regular part time.
- An employee who works less than 16 hours will be responsible for pro-rated portion of tuition repayment.
- Schedules should be discussed between the employee and the manager.
- Flexibility of the employee's work schedule is at the discretion of the manager. Although managers will work with employee's school and work schedule, patient care staffing is the highest priority.
- Any change in employment status must be submitted in writing to the Human Resources Education Benefits Specialist.

### **Number of Years to Complete Program**

Employees must complete their degree within five years of the date of enrollment into Carilion Clinic Tuition Advancement. Failure to complete the program in five years will result in withdrawal of student from program, and the student will owe one year of service to Carilion Clinic to avoid any tuition repayment.

### **Financial Aid**

Tuition Advancement employees are required to complete a VTAG application and any other financial aid applications that are recommended by the financial aid department or college. Tuition Advancement applications will not be submitted for approval until the VTAG application has been submitted to the Financial Aid office at JCHS.

### **Costs Not Covered by Carilion Tuition Advancement Program Policy**

The Carilion Clinic Tuition Advancement Benefit does not pay for books, lab fees, lab coats, uniforms, or equipment. Employees are encouraged to contact the college business office for more information. Employees may not use the Tuition Reimbursement Benefit while already enrolled in Tuition Advancement.

### **Coursework**

- Tuition Advancement will provide up to 2 semesters of "pre" or general coursework. After two semesters, the student must be accepted into the professional program. If additional

semesters are needed the employee/student may choose to apply for the Carilion Tuition Reimbursement benefit.

- Tuition Advancement will not pay for any classes that an employee must repeat.
- Employees are allowed to change their major one time, but still must re-apply for Tuition Advancement and must complete the program of study within the 5 years from the date of enrollment into Tuition Advancement.
- Employees interested in pursuing additional degrees should contact the Human Resources Education Benefits Specialist. Tuition Advancement applications are only current for the degree in which the student is actively pursuing. The student must re-apply for Tuition Advancement and sign another service agreement when choosing to pursue another degree.

### **Minimum Grade Point Average Policy**

- Tuition Advancement employees must maintain a GPA of 2.5 or above each semester. GPA requirements are based on the semester GPA, not the cumulative GPA.
- A student will be withdrawn from Tuition Advancement if he/she does not meet the minimum requirements two consecutive semesters or more than two semesters.
- If the student does not earn a 2.5 GPA or above, a letter will be sent from the Education Benefits Specialist stating that the student must achieve a 2.5 GPA or above the following semester to continue with Tuition Advancement.
- It is the student's responsibility to notify the Education Benefits Specialist of any address changes. Letters will be sent to the most recent address in the student/employee's Tuition Advancement file.
- If the student is withdrawn due to noncompliance with the GPA requirements, he/she must fulfill a one year service commitment to avoid any tuition repayment. Any tax obligations will begin when the student is withdrawn from Tuition Advancement.

### **Number of Credit Hours**

Employees must take a minimum of six credit hours per semester except for the summer semester. Employees are not required to take any courses during the summer semester unless failure to do so would not allow completion of the degree in the maximum five years allotted under the Carilion Tuition Advancement Benefit.

If under unusual circumstances, an employee must take less than six credit hours a written request must be submitted to the Human Resources Education Benefits Specialist. The request should state the reasons and include approval from the advisor and/or counselor. Final decision will be made by Carilion Human Resources.

### **Challenge Exam**

Tuition Advancement will not cover challenge exam fees, but will pay the tuition for the credits earned once completed. The credits earned from a challenge exam do not count towards the minimum 6 credit hours per semester requirement.

### **Drop/Add**

- Tuition Advancement will not pay any administrative fees associated with dropping or adding.
- Employees who drop a class after the "last date to drop a class with a refund date" as published in the College catalog and student handbook will be required to pay for that class when taken in another semester.
- Tuition Advancement will pay for each class one time.
- Employees who drop a class which then results in a level below the minimum 6 credit hours required by the Carilion Clinic Tuition Advancement Benefit will be required to pay the tuition for that semester.

- Any student requesting to take less than 6 credit hours, should submit a written request at least 2 weeks prior to the start of the semester. Approval from Education Benefits Specialist is required.

### **Skipping a Semester**

A Carilion Clinic employee is expected to be in school each semester except for summer unless required to complete the program of study in 5 years.

If under unusual circumstances, an employee must skip a semester, a written request must be submitted to the Human Resources Education Benefits Specialist, which must be submitted four weeks prior to the start of the semester. Final decision will be made by Human Resources.

### **Tuition Advancement Exceptions/Considerations**

- Major illness or surgery for the employee, employee's spouse, or employee's child
- Death of an immediate family member
- Birth or adoption
- Other extreme circumstances to be approved by Human Resources.

### **To Withdraw from Carilion Clinic Tuition Advancement**

- Employees who withdraw from Tuition Advancement are required to submit a letter of termination to the Human Resources Education Benefits Specialist within 5 working days of the withdrawal date.
- Employees who withdraw from Carilion Tuition Advancement must remain employed with Carilion for one year to avoid tuition repayment. Otherwise a pro-rated portion of the tuition will be due. Any tax obligations associated with Tuition Advancement will begin.

### **Resolving Work Scheduling Problems**

- Flexibility of the employee's work schedule is at the discretion of the manager. Although managers will work with employee's school and work schedules, patient care staffing is the highest priority.

### **Employment Policy**

Within 90 days of graduation, the employee is required to apply for a position consistent with his/her achieved degree or certificate, if not already employed in that field. If the student does not apply for a position in his/her field within 90 days, the student must repay the tuition in full.

### **Termination of Employment**

If an employee voluntarily or involuntarily separates employment from Carilion Clinic while enrolled in Tuition Advancement or while fulfilling a service commitment, he/she will be required to repay all or a pro-rated portion of tuition.

### **Tax Implication Policy**

- Carilion will pay the tuition while the employee is attending school.
- Once an employee obtains the degree or certification, the IRS considers any tuition paid over the excludable amount as defined by the current tax code as taxable income.
- Sums incurred beyond \$5,250 per calendar year will be taxable to the employee upon graduation.
- Once the service commitment begins, payment of the required applicable taxes associated with Tuition Advancement must be paid.
- The amount considered taxable income is spread over the total number of pay periods remaining in the service commitment. This will be the pro-rated amount that will be taxable, along with the gross wages, each pay period.

### **Service Commitment**

- **Certificate or one-year program** - Requires 1 year of full-time service or 18 months of regular part-time service
- **Associate's Degree** - Requires 2 years of full-time service or 3 years of regular part-time service
- **Associate's to Bachelor's Degree** - Requires 2 years of full-time service or 3 years of regular part-time service
- **Bachelor of Science** (4 year degree)-Requires 3 years of full-time service or 3 years of regular part-time service.
- **Master's Degree** - Requires 2 years of full-time service or 3 years of regular part-time service

### **Non-Compliance**

Employees/Students who do not comply with Tuition Advancement guidelines may be subject to tuition repayment and/or disciplinary action.

### **For Associate Degree and Traditional Bachelor's degree Nursing Students Only:**

#### **Practicum Placement**

Practicum students are encouraged to complete their Clinical Practicum assignment at a Carilion Clinic facility, which will allow an easier transition from student nurse to a staff nurse. Our experience has demonstrated that practicums allow the student to gain valuable clinical experience in the Carilion Clinic nursing environment and allows the student to begin at a more well prepared level.

## Tuition Advancement Application

**Instructions: Complete and sign the application, service commitment and release agreement. Your manager must sign this application. Send completed paperwork to the Education Benefits Specialist, Human Resources, 1202 Third Street, Roanoke, VA 24016. Once received, you will be contacted by email to schedule an appointment.**

Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Kronos \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone (\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

Job Title \_\_\_\_\_ Department \_\_\_\_\_ Original Hire Date \_\_\_\_/\_\_\_\_/\_\_\_\_

- Current Status:  Regular Part-time  Full-time
- Are you authorized to work in the U.S. 40 hours per week?  Yes  No  
(Proof of current authorization is required.)
- Are you currently enrolled in school?  Yes  No  
If yes, where? \_\_\_\_\_ Estimated completion date \_\_\_\_/\_\_\_\_/\_\_\_\_

Which semester do you wish to begin Tuition Advancement?  Summer  Fall  Spring Year \_\_\_\_\_

**Choose the program at JCHS for which you are applying:**

- |  |  |
|--|--|
| <input type="checkbox"/> Associate of Science in Nursing (R.N.)<br><input type="checkbox"/> Licensed Practical Nursing (L.P.N.) Career Mobility to R.N. (Associate's degree)<br><input type="checkbox"/> Respiratory Therapist or Paramedic to R.N. (Associate's degree)<br><input type="checkbox"/> Bachelor of Science in Nursing (4 year program)<br><input type="checkbox"/> R.N. to Bachelor of Science in Nursing (2 plus 2 completion program)<br><input type="checkbox"/> Master of Science in Nursing (M.S.N.)<br><input type="checkbox"/> Practical Nursing Program (1 year program) | <input type="checkbox"/> Respiratory Therapy (Associate's degree)<br><input type="checkbox"/> Bachelor of Science in Healthcare Management (2 plus 2 completion program)<br><input type="checkbox"/> EHS-Paramedic<br><input type="checkbox"/> Clinical Laboratory Scientist (MT – 1 year program) |
|--|--|

I certify that I have applied or will apply to the program chosen above and that I will apply for any state or federal aid as required. If Tuition Advancement is granted, I understand that this does not guarantee that I will be granted admission to Jefferson College of Health Sciences. I further understand that acceptance to the college does not guarantee approval of my Tuition Advancement application.

Employee Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**To be completed by Manager**

- Recommend  Do not recommend – as to desire and ability to complete course of study
- Completed orientation requirements?  Yes  No Explain \_\_\_\_\_
- Flexibility in scheduling?  Yes  No Explain \_\_\_\_\_
- Manager Name (print) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_
- Department/Unit \_\_\_\_\_ Cost Center \_\_\_\_\_ Phone \_\_\_\_\_

Approved  Denied \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Carilion Human Resources

## Tuition Advancement Service Commitment

This agreement made this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between Carilion Clinic (the "Employer") and \_\_\_\_\_ (the "Employee") provides:

1. The Employer will advance the tuition under the condition that the Employee will continue to work for the Employer.
2. The Employee agrees to abide by the terms and conditions of the Tuition Advancement policy. Tuition Advancement will be based on the policy guidelines in force at the educational program start date. The Employer reserves the right to amend the policy.
3. A service commitment will begin upon completion of the educational program, based on employment status at that time.
  - (a) **Certificate and One-Year Programs** – Service commitment of 1 year as a full-time employee or 18 months as a regular part-time employee.
  - (b) **Associate Degree** – Service commitment of 2 years as a full-time employee or 3 years as a regular part-time employee.
  - (c) **Associate Degree to Bachelor of Science Degree** - Service commitment of 2 years as a full-time employee or 3 years as a regular part-time employee.
  - (d) **Bachelor of Science (4 year degree)** – Service commitment of 3 years as a full-time or regular part-time employee.
  - (e) **Master of Science in Nursing** – Service commitment of 2 years as a full-time employee or 3 years as a regular part-time employee.
  - (f) If employee participates in the Benefit after a portion of the requirements for degree or certification are complete, the service commitment will be pro-rated.
4. I understand that at the time my service commitment begins, the Internal Revenue Service (IRS) views the tuition advanced for my degree or certification as taxable income for amounts that exceed \$5,250 per calendar year. Amount of tuition less any financial assistance received (such as the Virginia Tuition Assistance Grant) will be pro-rated by pay period over the length of my service commitment.
5. Repayment of Tuition:
  - (a) If the Employee withdraws from the educational program, the Employee will owe one year of service to the Employer and the tax obligation will begin.
  - (b) If Employee fails to work the agreed upon service commitment, the Employee agrees to repay a pro-rated portion of tuition.
  - (c) If Employee has a change in work status, the Employee agrees that service commitment must be recalculated.
  - (d) If Employee separates employment with the Employer, whether voluntarily or involuntarily, a prorated portion of the tuition must be repaid.
  - (e) The service agreement does not begin until after the program of study is complete.

- (f) The employee must apply for a position in the field for which they attended school within 90 days of graduation.
- (g) Any amount of repayment will be due within 90 days of the last day of employment.

- 6. The Employee agrees to apply for a position consistent with their achieved degree or certificate within 90 days of graduation. If the employee does not apply for a position, the Employee agrees to repay the full amount of tuition.
- 7. If the employee is working out a service agreement from a previous Tuition Advancement degree, the terms of that agreement supercedes the second including a minimum of regular part-time work status.
- 8. The Employee agrees to pay any collection costs and reasonable attorney's fees associated with enforcement of this service commitment.
- 9. This Agreement shall not be construed to give Employee the right to be retained in the service of the Employer, retained or assigned a specific position or to interfere with the right of the Employer to separate the Employee at any time and for any reason.

IN WITNESS WHEREOF, and as evidence of their agreement to the foregoing provisions, the Employer and the Employee sign this Agreement as of the date above.

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Employee Date

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Carilion Clinic Human Resources Date

**Agreement to Release Academic Information**

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**Jefferson College of Health Sciences**

I am enrolled in the Tuition Advancement Program with Carilion Clinic, and as part of my participation in this Program, I am required to furnish Carilion Clinic with information regarding my educational status, grades and academic standing at the Jefferson College of Health Sciences. By signing my name below, I hereby authorize the Jefferson College of Health Sciences to release to Carilion Clinic any and all information requested by Carilion Clinic regarding my educational status, grades and academic standing at the Jefferson College of Health Sciences. By signing my name, I further release and hold harmless Carilion Clinic, its subsidiaries, including Jefferson College of Health Sciences, officers, directors, employees and agents from any and all liability arising from the Jefferson College of Health Sciences' release of said information to Carilion Clinic and Carilion Clinic's use of said information in connection with the Tuition Advancement Program.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Program: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

## Agreement to Terms and Conditions

I, \_\_\_\_\_, certify that I have met with the Education Benefits Specialist and have read, understand, and will abide by the Carilion Tuition Advancement Terms and Conditions. I understand that if I do not follow the Tuition Advancement Terms and Conditions, I may no longer be eligible to receive the Benefit and/or may be required to repay the tuition advanced on my behalf in full or a pro-rated portion.

\_\_\_\_\_  
Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Education Benefits Specialist

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date