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## **POLICY**

It is the policy of Johns Hopkins Health System Corporation (JHHSC) and The Johns Hopkins Hospital (JHH) to invest in the continuing education of its employees.

## **ELIGIBILITY**

Tuition assistance is available and may be granted, after 60 days of employment, to full-time employees regularly scheduled to work 40 hours per week and part-time employees regularly scheduled to work 20-39 hours per week. To receive reimbursement, eligible employees must pursue a course of study at an accredited university or college that leads to licensure, degree, and/or meets the criteria of business or operational necessity related to current position or another position within JHHSC/JHH. In this educational partnership, the employee agrees to a service payback commitment, as described in this policy.

## **TUITION BENEFIT**

### *Employees Hired Prior to 1/1/07*

Employees may take up to 18 credits per academic year for undergraduate courses and those pursuing a Masters or PhD (September 1-August 31). Employees in an accelerated MBA/MHS program may take a maximum of 24 credits per academic year. Employees will be eligible for tuition assistance up to a maximum of 18/24 credits or \$10,000 per academic year whichever is greater.

### *Employees Hired 1/1/07 or Later*


Employees are eligible for tuition assistance up to a maximum of \$10,000 per academic year (September 1-August 31) at any accredited university/college (see HR332 Policy for conditions).

### *Effective 9/1/07*

Employees hired 1/1/07 or later, who attend the JHU School of Nursing, are eligible for a maximum of \$15,000 per academic year. This is applicable only to those attending the JHU School of Nursing.

## **Conditions**

1. Satisfactory completion of approved courses or Challenge Exams are: a "C" or better for Undergraduate courses; a "B" or better for Graduate courses; for Pass/Fail courses, a "P" grade accompanied by a letter from the instructor indicating the equivalent letter grade.
2. Each non-credit course will be the equivalent of a three-credit course to determine maximum semester credits hours per academic year.
3. An employee whose status changes to other than active, full-time or part-time, 20 hours or more, prior to completion of any course or Challenge Exam, is not eligible for reimbursement for those courses.
4. Eligibility for reimbursement will be determined by the employee's full-time or part-time status at the course ending date.

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5. An employee's status must remain the same during the service pay back period as when the class started (e.g., if an employee works 40 hours and was reimbursed at 100%, he or she must remain 40 hours during the service pay back period).
6. An employee who currently is under written disciplinary action prior to approval of any course or Challenge Exam is not eligible for reimbursement approval/consideration.
7. Tuition Assistance is considered taxable income for undergraduate and graduate programs in excess of \$5,250 annually, as determined by Internal Revenue Service (IRS) Guidelines.
8. Amounts reimbursed/advanced will be for tuition only and Challenge Exams. The employee pays all fees. JHHSC/JHH will not duplicate reimbursement made by any other agency or institution.

#### **Approved Educational Institutions**

JHHSC/JHH will recognize only accredited technical, vocational, and post-secondary educational institutions in the Baltimore-Washington metropolitan area, or in the geographic area of the employee's legal residence. If it is outside of this area, exceptions to this may be made, provided the employee's vice president approves the course of study and submits a written explanation of necessity for the course outside the geographic area to the HR Service Center/Benefits.

#### **Courses**

Courses for credit and Internet courses are covered under the policy, provided that such course work leads to licensure or a degree. Correspondence courses, seminars or conferences are not covered by this policy. Reimbursement for such programs will be the responsibility of the department if it deems such training necessary.

Non-credit courses that are required as part of the curriculum leading to a degree or licensure will be considered on case-by-case bases subject to approval of the Director of HR Service Center/Benefits. Computer software courses (e.g., Microsoft Word, Excel, Access) are not covered under the Tuition Policy.

#### **Technical/Vocational Programs (Represented Employees Only)**

Employees enrolled in technical or vocational programs are required to turn in a certificate of completion.


#### **Challenge Exams**

Challenge Exams for courses toward a degree program will be considered for reimbursement as individual courses. If the Challenge Exam is not pass/fail and a grade is awarded, the standard grading criteria, as outlined in this policy, will apply.

#### **Tuition Advancement for Associate, Baccalaureate, and Hopkins Supported Programs (Excludes Graduate Studies)**

Tuition may be advanced to an employee under the following conditions:

1. **Eligibility:** All non-represented employees earning less than \$30,000 annually (\$14.42/hour) are eligible for tuition advancement.

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2. **Represented Employees:** A special fund has been set up in accordance with the Collective Bargaining Agreement. Only the initial advanced tuition amount will be charged to the fund. Subsequent reimbursement will be charged to the Tuition Assistance Program.
3. **Agreement:** An employee receiving tuition advancement must sign a legally binding agreement that if she/he fails to meet the requirements of this policy, she/he will be obligated to repay the amount advanced either through payroll deductions or through other legal means. If employee does not repay the advancement, department funds will be deducted accordingly.
4. **Unsuccessful Completion of Course:** Employees receiving tuition advancement, who do not successfully complete the course, will not be eligible for additional tuition advancement or reimbursement until the initial advancement has been repaid.

### SERVICE PAYBACK

An employee receiving tuition assistance (reimbursement or advancement) must agree in advance (as part of the application/approval process) to work for JHHSC/JHH for a period of time.

#### Service Payback Schedule 1 Affects 2 Groups:


1. **Employees Hired 1/1/07 and Later**
2. **Employees Hired Prior to 1/1/07 Must Comply with Schedule 1 after 12/31/07. Between 1/1/07 and 12/31/07, employees must comply with Schedule 2.**

After satisfactory completion of the last completed semester, an employee must agree to work for JHHSC/JHH as follows based on the total dollars reimbursed to you under the tuition assistance program:

#### SCHEDULE 1:

Dollars Reimbursed	Service Payback
\$0 - \$4,999	1 year of service
\$5,000 +	2 years of service

If for any reason an employee terminates employment with JHHSC/JHH before completion of the service payback requirement described above, the employee must repay all educational assistance amounts provided for the course(s) for which the service payback was required. The repayment obligation will be prorated to take into account any partial completion of the service payback requirement. By accepting educational assistance, an employee expressly authorizes his or her employer to withhold any repayment amounts required under this Policy, and in accordance with the Maryland Wage Payment and Collection Law, Maryland Annotated Code S 3-503(2) from any amounts owed to the employee (including but not limited to the employee's final pay or PTO pay). If the employee fails to make any required repayment and JHHSC/JHH takes action to recover the repayment obligation, the employee agrees to pay the fees incurred by JHHSC/JHH in pursuing recovery.

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**Nurse Practitioner (NP) Masters Degree**

Employees, who obtained their Masters degree and are qualified to be a Nurse Practitioner, may not be required to fulfill the above service payback requirement, if there is not a position available within JHHSC/JHH. This exception is subject to the approval of the VP of Nursing and is made due to the requirement that a Nurse Practitioner must be actively working as a NP to maintain certification.

**SCHEDULE 2: Employees Hired Prior to 1/1/07 (Calendar Year 2007 Only)**

Course Taken	Service Payback for Undergraduate, Masters and PhD (Following Class End Date)	Service Payback for accelerated MBA/MHS Programs
January-June	6 months	8 months
July-December	6 months	8 months
Completion of Degree	1 year	1 year, 4 months

Tuition assistance received for the semester ending 12/06 requires working for JHHSC/JHH for the 6 months (or 8 months) from 1/07-6/07 except if the semester ending 12/06 resulted in completion of a degree program, and then the service payback period would be the 12 months from 1/07-12/07. Tuition assistance received for the 1/07-6/07 period (and any subsequent semester) would be counted toward the new dollars reimbursement service payback provision, as outlined above and tuition assistance received before 1/1/07 would also be counted.

This service payback requirement is not an employment contract and in no way obligates Hopkins to provide any future employment to any person. The HR Service Center/Benefits in its sole discretion may waive part or all of any repayment requirement in the event of involuntary termination of employment without cause.

**NOTE:** Service payback will be prorated according to the reimbursement schedule, if applicable.

**Business Necessity:** For purposes of this policy, business necessity is defined as a course(s) needed to maintain or enhance skills in current job.


**Operational Necessity:** For purposes of this policy, operational necessity is defined as a course(s), which meets the operational needs of JHHSC/JHH. Such course work requires the approval of the department's vice president.

**FORMS**

Tuition assistance includes (a) tuition reimbursement and (b) tuition advancements.

Tuition reimbursement is payment made after completion of an approved course. Tuition advancement is payment made before completion of an approved course.

**1. APPLICATION FOR TUITION REIMBURSEMENT**

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The Tuition Assistance Application, grades, itemized bill and proof of payment must be submitted to the HR Service Center/Benefits at the end of the course, but no later than six months following the end of the semester. A Tuition Assistance Application must be completed each semester. Proof of payment consists of a canceled check (copy of the front and back), bank statement, credit card statement and or a paid receipt from the college/university.

## 2. Application for Tuition Advancement

A Tuition Assistance Application, along with an itemized bill from the college/university must be submitted no later than four weeks before the course starting date. Applications submitted after the class has started, will not be processed as an advancement. Official grades must be submitted within one month from the completion date of the course.

### REIMBURSEMENT/ADVANCEMENT

Program Reimbursement/Advancement is based on the following:

Scheduled Hours per Week	Reimbursement/ Advancement Amount
40	100%
30-39	75%
20-29	50%

### PROCEDURES

#### **Employee**

Completes tuition application and delivers to Supervisor/Manager for signature.


#### **Supervisor/Manager**

1. Reviews request and conducts educational development plan and service payback discussion with the employee. See attached Educational Development Discussion Guideline (Addendum A).
2. Approves/disapproves request, obtains department head approval and returns form to employee.

#### **Employee**

For Advancement: Submits completed tuition application to the HR Service Center/Benefits at least four weeks prior to course starting date.

For Reimbursement: Submits completed application to HR Service Center/Benefits at the end of the semester but no later than six months following completing of the semester.

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**HR Service Center/Benefits**

Processes reimbursement or advancement if applicable.

**SPONSOR**

Vice President, Department of Human Resources

**REVIEW CYCLE**

3 years


**APPROVAL**



\_\_\_\_\_  
 Vice President, Human Resources      Date

**Amendment Record**

Date	Page	Details of Amendment
7/1/03	1	Added to policy: Employees that are in an accelerated MBA/MHS program may take a maximum of 24 credits per academic year.
7/1/03	1	Added to policy: An employee's status must remain the same during the service pay back period as when the class started.
7/1/03	2	Added to policy: Internet courses are covered.
7/1/03	2	Added to policy: Employees, who are enrolled in Technical or Vocational programs, are required to turn in a certificate of completion.
7/1/03	2	Policy change: Tuition may be advanced to all non-represented employees earning less than \$30,000 annually (\$14.42/hour).
7/1/03	2	Policy change: Applications for Tuition Advancement submitted after the class has started, will not be processed.

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## Addendum A

### Educational Development Discussion Guideline

This document is a tool that may be used by Managers to help facilitate the discussion of career goals with the employee applying for assistance under the Tuition Assistance Program. This list is not intended to be inclusive, but rather as a guide for managers to use in discussions with employees.

Discussion Points May Include:

1. Determine the employee's interest in pursuing this course of study.
2. Determine how this course of study relates to the employee's development plans, career plans, business necessity, or operational necessity.
3. Determine the additional competencies the employee will gain after completing the course or program.
4. Determine the time frame in which the employee will complete the course or program.
5. Determine appropriateness of the employee's current course load.
6. Ask the employee how you, as their manager, can provide assistance (accommodation of work schedule, etc.).
7. Inform the employee of other internal educational resources provided through the Department of Human Resources.
  - a. Career counseling - Career Services, 410-955-6575.
  - b. Training opportunities - Office of Training and Development, 410-955-6748.

#### **Other Discussion Items**

1. Discuss the service payback requirements, as outlined in the policy, with your employee:

Service Payback Guidelines

2. Review the next steps of the application process with your employee.

**NOTE:** This guideline should be part of the development plan process associated with Performance Management; it is not intended to replace it.