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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 by providing an Educational Assistance Benefit to assist with costs.

ELIGIBILITY

Educational assistance is available and may be granted, after sixty (60) days of employment, to full-time employees regularly scheduled to work forty (40) hours per week, and part-time employees regularly scheduled to work twenty (20) to thirty-nine (39) hours per week. To receive reimbursement, eligible employees must pursue either of the educational opportunities described below, and agree to fulfill a work commitment as further defined in this policy:

- (1) a course of study at an accredited university or college that leads to licensure and/or a degree, or
- (2) meets the criteria of business or operational necessity related to the employee's current position or another position within JHHSC/JHH as determined by the Human Resources Department.


EDUCATIONAL ASSISTANCE BENEFIT

LICENSURE AND/OR DEGREE PROGRAMS

- **EMPLOYEES HIRED PRIOR TO 1/1/2007**
Employees hired prior to 1/1/2007 may take up to eighteen (18) credits per academic year for undergraduate courses and those pursuing a Masters or PhD (September 1-August 31) or \$10,000—whichever is greater. Employees in an accelerated MBA/MHS program may take a maximum of twenty-four (24) credits per academic year.
- **EMPLOYEES HIRED 1/1/2007 OR LATER**
Employees hired 1/1/2007 or later will be eligible for tuition assistance up to a maximum of \$10,000 per academic year for undergraduate or accelerated MBA/MHS programs.
- **EFFECTIVE 9/1/07**
An employee who attends the JHU School of Nursing is eligible for a maximum of \$15,000 per academic year. This is applicable only to those attending the JHU School of Nursing.
- **EFFECTIVE 9/1/10 (APPLICABLE TO THOSE HIRED 1/1/07 OR LATER)**
Employees pursuing an accelerated MBA/MHS program will be eligible for tuition assistance up to a maximum of \$15,000 per academic year.

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 (3)-credit course to determine maximum semester credits hours per academic year.

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3. An employee whose status changes to other than active, full-time or part-time, twenty (20) hours or more, prior to completion of any course or Challenge Exam, is not eligible for reimbursement for those courses. **(This change is effective 9/1/2010).**
4. An employee's status must remain the same during the service payback period as when the class started (e.g., if an employee works forty (40) hours and was reimbursed at 100%, he or she must remain forty (40) hours during the service payback period).
5. An employee who is currently under written disciplinary action prior to approval of any course or Challenge Exam is not eligible for advancement or reimbursement approval/consideration.
6. **Education Assistance is considered taxable income for undergraduate and graduate programs in excess of \$5,250 annually, as determined by Internal Revenue Service (IRS) Guidelines.**
7. 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.

ELIGIBLE DEGREE PROGRAMS

The Education Assistance benefit is applicable only to those degree programs listed in [attachment B. Covered Degrees.](#)

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 in consultation with Human Resources, 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 a case-by-case basis 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.

CERTIFICATIONS/SPECIALIZED TRAINING

To enhance an employee's skills applicable to his or her current position, or to train an employee for a future position, a department may approve the cost of a certification course(s) or specialty training up to a maximum of \$500 annually.

Any request for certification or specialized training in excess of \$500 must be approved by the Vice President of Human Resources. The request for approval shall include details on the need for the training

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in terms of its business or operation necessity, and must set forth total costs, including program expenses, travel and materials, if applicable. If approved, the cost of the training will be paid by the department. In addition, the employee must sign an Educational Assistance/Loan Forgiveness Agreement in which the employee agrees to continue to work in his or her current position or, in some cases, a different position (based on the training received and as approved by the department) for a specified period of time (the "Work Commitment") as further described in this policy. The educational assistance loan forgiveness agreement is available from the HRSC/Benefits office, Phipps 455.

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, BACHELORS, AND HOPKINS-SUPPORTED PROGRAMS (EXCLUDES GRADUATE STUDIES)


The cost of tuition may be advanced to an employee under the following conditions:

1. **Eligibility:** All non-represented employees earning less than \$35,000 annually (\$16.83/hour) are eligible for tuition advancement.
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 Educational 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.
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.

WORK COMMITMENT

An employee receiving education assistance or certification or specialized training in excess of \$500 must agree to work for JHHSC/JHH for a specified period of time (the "Work Commitment") in return for the educational assistance received. In the event that the employee fails to fulfill the Work Commitment, the employee will be obligated to repay a pro-rata portion of the amount of assistance received. Employees receiving certification or specialized training in excess of \$500 will be required to sign an Education Assistance/Loan Forgiveness Agreement setting forth the terms of the Work Commitment.

Upon satisfactory completion of the last completed semester, or completion of certification or specialized training, an employee must agree to work for JHHSC/JHH as follows based on the total dollars reimbursed or advanced to the employee under the educational assistance program:

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Dollars Reimbursed	Work Commitment
\$0 - \$500—Certification/Specialized Training	None required
\$0 - \$4,999*	1 year of service
\$5,000 +	2 years of service

*The first \$500 of assistance for certification and/or specialty training programs is not subject to payback requirements.

Service Payback Example

As the employee is working, he/she is fulfilling his/her work commitment for the previous semester. The 1- or 2-year work commitment rolls over with each application submitted thereafter. *An employee would have a 2-year work commitment obligation once the \$5000 mark is reached. The work commitment period starts after the last day of the semester for each application submitted.

Example:

1st application—Tuition \$2500 course ends 5/1/10 work commitment starts 5/2/10 ends 5/2/11

2nd application—Tuition \$5000 course ends 8/1/10 work commitment starts 8/2/10 ends 8/21/12

**Each application submitted thereafter will also have a 2-year work commitment.*

Based on the example above: If an employee resigned 8/2/11, he/she would owe \$2500 on application #2. The work commitment on application #1 would be fulfilled.

NOTE: An employee's payback of educational assistance will be pro-rated according to the Work Commitment 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

Educational assistance includes (a) tuition reimbursement and (b) tuition advancements forms. Forms are available on the HR Web site at www.hopkinsmedicine.org/jhhr or the HR Service Center located in the Phipps building on the 4th floor.

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

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 (**showing a zero balance**) from the college/university.

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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 (4) 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 (1) 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 work commitment 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 JHHSC/JHH Tuition Assistance Application to the HR Service Center/Benefits at least four (4) 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 (6) months following completion of the semester.

For Certification or Specialized Training: Submits request to department manager or director. Certificate or specialized training in excess of \$500 must be submitted to the Vice President of Human Resources, indicating the business or operational necessity for the training.

HR Service Center/Benefits

Processes reimbursement or advancement, if applicable.

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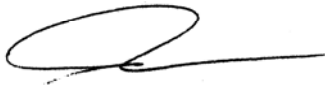
SPONSOR

Vice President, Department of Human Resources

REVIEW CYCLE

3 years


APPROVAL



Vice President, Human Resources

6/1/10

Date

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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 Educational 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,
 - b. Training opportunities - Office of Training and Development
8. Other Discussion Items
 - a. Discuss the Work Commitment requirements, as outlined in the policy, with your employee

Work Commitment Guidelines

- a. 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.