

University of Colorado Medicine



Tuition Assistance Guidelines

Policy Statement

University of Colorado Medicine (CU Medicine) provides financial support to employees who participate in externally sponsored educational courses which meet the criteria outlined in these Guidelines. Such support is intended to enhance employees' professional development and their skills and knowledge related to our business.

Administrative Guidelines

I. Requirements

A. Eligibility

Active employees who are classified as "full-time" (regularly scheduled to work 40 hours per week) with at least one year of continuous service immediately prior to the start of the course are eligible to apply for reimbursement for qualified tuition expenses. (For purposes of these guidelines, "active" means employees who are not on a leave of absence at the time of taking the course.)

B. Termination of Eligibility

1. Eligibility ceases upon notice of termination of employment. No assistance will be offered to former employees, to employees who have given notice of resignation, or who have been notified that they will be involuntarily terminated. This includes situations in which approval of such assistance was previously provided and/or the course was satisfactorily completed prior to the date of termination. The only exception to this will be to employees whose jobs are eliminated. In that case the employee will be eligible for assistance for any approved courses that are in session at the time of their job elimination.

2. Eligibility for tuition assistance also ceases when an employee receives an overall performance rating on their most recent annual review below a "3 - Solid" or receives a written warning or other disciplinary action plan while taking tuition assistance courses. In those circumstances, the employee may complete courses that are in session at the time of the performance rating or disciplinary action but will not be eligible for assistance for any new courses enrolled in after receiving the performance rating, and prior to attaining an overall performance rating of "3 - Solid" or better or resolving any stated performance issues as determined by their manager and the Human Resources Director.

C. Types of Assistance

Assistance, when approved, is given in the form of tuition reimbursement after successful course completion. Successful completion of a course shall be evidenced by a report from the school showing a passing grade of at least "C" or better. If grades are not normally awarded, a statement of satisfactory completion must be presented; for instance, this may include a pass/fail situation.

D. Approved Schools

Courses taken at accredited academic universities and colleges will be eligible for consideration. Correspondence courses or online courses will be considered for reimbursement only from accredited academic universities and colleges and only when they are determined to be equivalent or superior to comparable classroom instruction.

E. Courses Eligible for Reimbursement

Eligibility for reimbursement of courses will be determined by any one of the following criteria:

- Coursework relevant to the employee's current job assignment;
- Coursework relevant to a position within CU Medicine for which the employee is being trained; or
- Coursework that applies to a specific business-related degree.

F. Timeframe to Complete Degree

- Employees must complete their degree within 5 years of entering the tuition assistance program.
- Employees are expected to take a minimum of 3 credit hours per each Fall and Spring semester they are in the tuition assistance program.
- Employees may be granted a maximum of 1 semester of leave from the program. This leave must be discussed with Human Resources and not interfere with an updated graduation plan.

G. Excluded

- Professional certifications are not covered under this policy.
- Fees and expenses associated with preparatory courses or certification exams are not covered under this policy.
- Situations which are not described, such as testing out of a course for the purpose of credit toward a business-related degree, or reimbursement for the costs of establishing credit for life experience that are applied toward a degree, are generally excluded.

II. Educational Benefit

A. Amount Reimbursed

For eligible full-time employees, assistance for eligible expenses is limited to the following amounts:

Type of Degree	Reimbursement Rate	Maximum Reimbursement Amount
Associates Degree (Credits 30+)	50%	up to \$48.13 per credit hour
Bachelors Degree (Credits 90+)	75%	up to \$213.00 per credit hour
Graduate Degree (Credits 1 – 9)	50%	up to \$248.00 per credit hour
Graduate Degree (Credits 10+)	90%	up to \$446.40 per credit hour

Eligible employees will be restricted to an annual reimbursement amount not to exceed \$3,200.

Eligible employees must be present at work 75% of the working hours while taking a course. If attendance falls below 75%, the employee will be reimbursed a percentage of the reimbursement amount equal to his or her attendance. If attendance drops below 50%, employee will not be eligible for any reimbursement.

B. Financial Assistance Outside of the Company

Eligible employees who receive assistance from outside sources (scholarships, grants, GI Bill, fellowships, and other stipends) are eligible for tuition assistance only if the cost of the tuition exceeds the amount of assistance received. In such cases, CU Medicine will reimburse the applicable percentage of the difference for qualifying tuition, up to the total dollar amounts noted above.

C. Payback Agreement

As a condition of tuition assistance the employee must agree that if he or she voluntarily or involuntarily leaves CU Medicine, the employee will repay CU Medicine the full amount of any tuition assistance received during the twenty four month period preceding the employee's termination date.

This payback agreement will not be enforced in situations where the employee's position is eliminated.

D. Graduation Requirement

As a condition of tuition assistance the employee must agree that if he or she voluntarily or involuntarily leaves CU Medicine prior to graduating or fails to complete the requirements to graduate within the allotted timeframe the employee will repay CU Medicine the full amount of any tuition assistance received during the twenty four month period preceding the employee's termination date.

This graduation requirement will not be enforced in situations where the employee's position is eliminated.

E. Employment Requirement

As a condition of tuition reimbursement the employee must agree to maintain employment with CU Medicine for two years following completion of his or her degree. If he or she voluntarily or involuntarily leaves CU Medicine, the employee will repay CU Medicine the full amount of any tuition assistance received during the twenty four month period preceding the employee's termination date.

This employment requirement will not be enforced in situations where the employee's position is eliminated.

III. Restrictions

In addition to any limitations or restrictions noted above, the following will apply:

- Approval for courses required in a business-related degree program will be given on a course-by-course basis for only one quarter or semester at a time. In no instance will a commitment be made for a degree program beyond one quarter or semester. CU Medicine may request verification of each course's applicability to a degree program before reimbursement is approved. Also, elective courses may not be approved where an employee has the option of taking other courses that are more applicable to business, yet the employee refuses to take that option.
- No commitment shall be made or inferred regarding job change, transfer or promotion upon completion of any coursework or degree program.
- Registration fees, textbooks, late fees, school supplies or other costs do not qualify for assistance.
- The cost of parking, travel, meals, lodging or other expenses related to the course is not reimbursable.
- Costs associated with externally sponsored training seminars, workshops and professional certifications are not covered in these guidelines.
- CU Medicine follows all rules and regulations concerning the taxability of reimbursements provided under applicable law. CU Medicine does not guarantee financial assistance will remain exempt from taxes.
- A job performance or misconduct issue may occur if an employee's job performance is suffering as a result of the time commitment required for the coursework, or if an employee is studying during work hours. These situations should be addressed like any other performance or discipline issue. CU Medicine reserves the right to withhold or restrict future tuition assistance until CU Medicine decides in its sole discretion that the problem will not reoccur.
- Employees will only be approved for one degree in each of the following levels: Associates, Bachelors and Graduate.
- If an employee already has a degree in a specific level, CU Medicine will not provide tuition assistance for another degree within that same level.

- Employees will not be accepted into the tuition assistance program until they have 30 credits remaining towards the completion of their chosen degree.

IV. Procedures

To qualify for and receive tuition reimbursement, the employee is required to:

- Complete the Tuition Assistance Request Form and the Repayment Agreement Form and have them approved by his/her manager and Human Resources **before enrolling** in the course.
- Enroll, pay the tuition and complete the course.
- Obtain evidence of satisfactory completion of the course as well as a statement/receipt reflecting the amount of the tuition paid (such as a tuition statement or receipt of payment for tuition).
- Complete the Request for Tuition Reimbursement Form and submit it with the following documents to Human Resources within 30 days of course completion.
 - A copy of your registration and bill for tuition
 - If tuition was paid by check, original processed check or a copy of the check and a signed Certification of Expense Form
 - If tuition was paid with cash, original receipt is needed stating that it was paid with cash
 - If tuition was paid by credit card, the original credit card receipt or a copy of the credit card statement and a signed Certification of Expense Form
 - A copy of your final grades for this/these course(s).
- Reimbursement will generally occur within 30 days following submission of all of the appropriate paperwork.

Questions concerning the Tuition Assistance Guidelines should be directed to Human Resources.