

<b>Policy Title: Tuition Reimbursement</b>	<b>Policy Number: SCAL.HR.3.03</b>
<b>Owner Department: Human Resources</b>	<b>Effective Date: 8/8/13</b>
<b>Custodian: HR Compliance</b>	<b>Page: 1 of 4</b>

## 1.0 Policy Statement

Employees are encouraged to take advantage of available opportunities for continuing their formal education in areas that are mutually beneficial to both the employee and Kaiser Permanente (KP). Courses must be related to an employee's work assignment or be such as to obviously improve the employee's potential for reasonable career advancement and employability. Financial reimbursement will be made to employees who meet the requirements of the Tuition Reimbursement Program.

## 2.0 Purpose

The purpose of this policy is to define the eligibility and benefits for tuition reimbursement and to maintain compliance with Internal Revenue Service codes as described in the National Education Reimbursement Program.

## 3.0 Scope/Coverage

- 3.1 This policy applies to eligible employees in the Southern California Region employed by any of the following entities (collectively referred to as "Kaiser Permanente"):
  - 3.1.1 Kaiser Foundation Health Plan, Inc. and Kaiser Foundation Hospitals (together, KFHP/H);
  - 3.1.2 KFHP/H's subsidiaries; and
  - 3.1.3 Southern California Permanente Medical Group (SCPMG). [NOTE: This policy does not apply to physicians and executives of SCPMG.]
- 3.2 All regular full-time, part-time and Local 7600 on-call employees scheduled 20 or more hours per week who have been in an active status for at least six consecutive months prior to the course start date are considered eligible employees. [NOTE: Certain provisions of this policy only apply to employees represented by a union in the Labor Management Partnership.]
- 3.3 If the following situations occur prior to course completion, an employee will not be eligible for reimbursement:
  - 3.3.1 voluntary resignation;
  - 3.3.2 discharge;
  - 3.3.3 voluntary change of status to less than 20 scheduled hours per week; or
  - 3.3.4 transfer to unpaid leave of absence.

## 4.0 Definitions

n/a

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## 5.0 Provisions/Procedures

### 5.1 Eligibility Criteria

5.1.1 Courses are to be taken on the employee's own time and outside regular working hours. Employees represented by a union in the Labor Management Partnership (LMP) may use tuition reimbursement in conjunction with any applicable education leave for eligible courses.

#### 5.1.2 Eligible courses

5.1.2.1 Eligible courses are those offered through an educational institution which has been accredited by the Western Association of Schools and Colleges (WASC) or a regional/local equivalent. Courses offered through the KP School of Allied Health Sciences are also considered eligible courses. Course(s) are to be taken for academic credit (units). A course must be completed with a grade of "C" or better, or "Pass" in cases of "Pass-Fail" or for "Credit" in cases of "Credit/No Credit."

5.1.2.2 Courses must be related to an employee's work assignment or be such as to obviously improve the employee's potential for reasonable career advancement and employability. Courses in music, art, dance, religion, physical fitness or courses related to hobbies will qualify only if they are required for a KP career-related degree or certification program.

5.1.2.3 Employees represented by LMP unions are also eligible for courses (including for basic skills programs, e.g., computer, basic math, second language and medical terminology courses) provided by an accredited institution, professional society or government agency for Continuing Education and/or to obtain or maintain licensure, degrees and certification. This includes courses, workshops, seminars, professional conferences, educational meetings, and special events taken/attended **for Continuing Education and/or to attain or maintain licensure or certification.**

5.1.2.4 Tuition Reimbursement Administration (TRA) may be contacted at 1-866-480-4480 for verification of eligible courses.

5.1.3 Employees must certify that they are not receiving any funds that they will not be paying back for the same course, such as grants, fellowships, scholarships, or any available alternative funding through internal programs or opportunities (e.g., Career Mobility for Continuing Education). Loans or other financial aid that will be paid back are acceptable for tuition reimbursement.

5.1.4 If in doubt about whether the course is reimbursable, the employee should consult with TRA by calling 1-866-480-4480.

### 5.2 Eligibility Exceptions

Employees who are laid off or suffer involuntary (RIF) status reduction will be eligible for reimbursement for classes commencing when the eligibility requirements were

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met (see Section 5.1). Courses must be completed and all other qualifying criteria met prior to reimbursement.

### **5.3 Reimbursement of Expenses**

5.3.1 Reimbursement is offered up to \$2,000 per calendar year. The actual amount an employee is eligible for is based on weekly scheduled hours as follows:

- 5.3.1.1 \$2,000 – employees scheduled for 40 hours
- 5.3.1.2 \$1,500 – employees scheduled for 32 to 39 hours
- 5.3.1.3 \$1,000 – employees scheduled for 20 to 31 hours

5.3.2 Tuition reimbursement is paid by Regional Human Resources.

5.3.3 Tuition Reimbursement is limited to:

- 5.3.3.1 course/class tuition/fee;
- 5.3.3.2 required materials (non re-usable by employee);
- 5.3.3.3 required textbooks; and
- 5.3.3.4 laboratory fees.

5.3.4 The following are not reimbursable expenses:

- 5.3.4.1 travel expenses;
- 5.3.4.2 room/lodging expenses;
- 5.3.4.3 food expenses;
- 5.3.4.4 vehicle-related expenses;
- 5.3.4.5 membership or association fees;
- 5.3.4.6 certification or license fees;
- 5.3.4.7 cost of periodicals, reference books, supplies, uniforms, equipment or other fees related to the course not mentioned previously;
- 5.3.4.8 advanced placement tests in lieu of course;
- 5.3.4.9 deferred payment fees; and
- 5.3.4.10 testing fees and graduation fees.

5.3.5 The following expenses are reimbursable for LMP employees only:

- 5.3.5.1 courses taken for Continuing Education and/or to attain or maintain licensure; and
- 5.3.5.2 workshops, seminars, professional conferences, educational meetings, special events etc.

### **5.4 Application and Reimbursement Procedure**

5.4.1 Employees must apply for tuition reimbursement prior to the course start date to ensure employee and course eligibility. Schools, programs, and courses are subject to review and may not be approved for reimbursement.



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- 5.4.2 Reimbursement documents (payment invoices and receipts, and class grade reports) must be returned to TRA within 90 days after the term or class end date.
- 5.4.3 Employees can submit Tuition Reimbursement Applications directly online through a link on My HR.
- 5.4.4 Employees should discuss their course plans with their supervisor.
- 5.4.5 Employees' supervisors will be asked to review and acknowledge employees' tuition reimbursement applications.

## **6.0 References/Appendices**

n/a

## **7.0 Approval**

This policy update (with no significant changes) was approved by Maryanne Malzone, Sr. HR Director, on behalf of SCAL, 8/8/13.

### **Revision History**

- Original Effective Date: 8/1/77
- Revision Effective Dates: 2/3/97; 7/02; 1/15/07; 11/13/09
- Updated Effective Dates: 9/02; 12/10/07; 8/22/11; 8/8/13