

Tuition Reimbursement

1. Eligible Employees:

- a. To be eligible for reimbursement, an employee must be actively employed by UMass Memorial in a benefit eligible position at the time tuition reimbursement and student loan repayment assistance is sought.
- b. To be eligible for reimbursement, an employee must be actively employed by UMass Memorial in a benefit eligible position at the time tuition reimbursement and student loan repayment assistance is processed.
- c. Employee must have also completed at least three months of employment before tuition reimbursement and student loan repayment assistance is sought.
- d. To be considered benefit eligible an employee must work in a budgeted position of at least 20 hours per week at UMass Memorial Medical Center and UMass Memorial Medical Group.

1. Tuition Reimbursement Process

- a. Employees must apply for tuition reimbursement no earlier than two weeks before the first day of class and no later than two weeks after the first day of class.
- b. Applications for tuition reimbursement must be completed through the online self-service portal.
- c. An employee who submits a tuition reimbursement application more than 14 days after the start of a course forfeits the opportunity to participate in the program for such course.
- d. Tuition reimbursement for employees who are on an approved leave of absence at the end of a course that has been approved for reimbursement will be withheld until they return from the leave of absence. Employees who are on an approved leave of absence at the beginning of a course may request approval of the course from the Sr. Director, Benefits in Human Resources. If approved, assistance will be withheld until the employee returns to active employment.

2. Eligible Courses for Tuition Reimbursement:

- a. Courses eligible for the tuition reimbursement program are those related to the employee's current position; or,
- b. Part of the employee's preparation for additional responsibilities within UMass Memorial to which the employee may reasonably aspire as determined by Human Resources, and that is consistent with both the employee's career interests and the projected business needs of UMass Memorial; or,
- c. Necessary to fulfill the curriculum requirements for a degree related to the employee's current position or another position within UMass Memorial as described immediately above.
- d. Courses must be taken at an accredited trade school, community college, four-year college, university or graduate program. Online/web-based courses must be certified by an appropriate accrediting body.

3. Eligible Expenses for Tuition Reimbursement:

- a. Reimbursement will be made available toward the cost of tuition, application fees, registration fees, lab fees, technology fees, education service fees, graduation fees, and books. Curriculum support fees for Massachusetts public colleges are considered a bona fide tuition expense. Other expenses or fees not specified above will not be eligible for assistance.
 - b. Additionally, scholarships, grants and tuition waivers will be subtracted from the total eligible tuition reimbursement. Employees who receive scholarships, grants and/or tuition waivers that fully cover all tuition expenses are not eligible for tuition reimbursement.
 - c. Upon submission of the approved tuition reimbursement request, evidence of satisfactory course completion, and receipts of eligible expenses within 30 days of the conclusion of the course, UMass Memorial will reimburse the eligible expenses up to the allowable amount of \$5,250 for full-time status employees or \$2,625 for part-time status employees per calendar year, as applicable
4. **Certificate Programs:** It is the intent of UMass Memorial to provide financial assistance to eligible employees in their pursuit of approved certifications which are required for the work functions they perform at UMass Memorial
- a. To be eligible for reimbursement for a Certificate Program an employee must work in a budgeted position of at least 20 hours per week at UMass Memorial Medical Center and UMass Memorial Medical Group.
 - b. Employee must have also completed at least three months of employment before reimbursement for a certificate program is sought.
 - c. The maximum payment towards a certificate program is \$500 annually.
 - d. Additional payment may be provided annually for certificate programs that are part of the Workforce Development strategy as outlined by the Workforce Development leadership not to exceed \$5,250 for full-time status or \$2,625 for part-time status.
 - e. Reimbursement for certificate programs will count towards maximum annual tuition reimbursement / student loan repayment benefit of \$5,250 for full-time status employees or \$2,625 for part-time status employees per calendar year, as applicable.
 - f. The following expenses will not be reimbursed through this program
 - i. Attendance at seminars, conferences or workshops associated with obtaining the certification or recertification
 - ii. Deposits, transportation, parking fees, hotel expenses, meals, or late fees.
 - iii. Reporting agency licensing fees
 - iv. Applicants who do not pass the requirements to obtain certification
5. **Student Loan Repayment Process**
- a. The student loan must be submitted to our third-party administrator to be eligible for loan repayment. If the employee links their loan on or before the last calendar day of month the loan will be paid in the following month.
 - b. Employees will be required to enroll in the Public Service Loan Forgiveness Program (if applicable) through our third-party administrator before student loan payments are made.

- c. Employees who have their student loans discharged or forgiven by an act of law or settlement are not eligible for student loan repayment assistance.
6. Eligible Student Loans for Student Loan Repayment
 - a. Most qualified federal and private student loans are eligible.
7. The maximum combined tuition reimbursement and student loan repayment assistance annual benefit (based on Calendar Year) is:
 - a. \$5,250 for Full time employees budgeted:
 - i. 30 + hours per week at the UMass Memorial Medical Center, UMass Memorial Medical Group
 - b. \$2,625 for part-time employees budgeted:
 - i. 20 – 29 per week at a UMass Memorial Medical Center and UMass Memorial Medical Group
8. The tuition reimbursement and student loan repayment may be taxable income to the employee, depending on applicable tax laws. Employees are encouraged to seek advice from their tax professional to determine if the tuition reimbursement and student loan repayment are taxable.
9. Employees must attend class on their own time, and not on company-time. Employees will not be compensated for time taken to attend class.
10. After the successful completion of coursework and reimbursement or student loan repayment, the employee is required to remain employed (in a staffed, benefited position) with UMass Memorial for a period of one (1) year following the date of reimbursement or loan repayment in that calendar year; otherwise, if the employee does not satisfy this one (1) year continued employment, the following shall apply:
 - a. Should an employee resign at employee's initiation, prior to completing the one-year continued employment condition following receipt of tuition reimbursement or student loan repayment, the employee must repay to UMass Memorial the tuition reimbursement previously received within the last year upon termination of employment.
11. The tuition waiver programs for University of Massachusetts Medical School clinical employees will remain in place for employees who transfer from the School to a UMass Memorial member entity under the terms of the merger legislation for the period of time that an employee remains employed by a UMass Memorial member entity. When employment is terminated with a UMass Memorial member entity, these benefits will cease. This section is applicable to employees hired prior to November 25, 1997. Eligibility for tuition waivers is determined by the University of Massachusetts Medical School and not by UMass Memorial. Employees should contact Human Resources at the University of Massachusetts Medical School to determine eligibility.
12. UMass Memorial, may, from time to time, develop, establish and/or support specific training programs for employees that provide tuition assistance or payments that

exceed the limits set forth in this Program. The terms and conditions applicable to such programs shall be set forth in each specific program description document.

13. UMass Memorial reserves the right to amend, modify or terminate this Program at any time.

Definitions

Calendar Year: Time period from January 1 through December 31.

Tuition Expense: An amount charged by educational institutions normally based on the number of credits awarded for courses taken and application fees, education service fees, administration fees, technology fees, registration fees, lab fees, graduation fees and books.

Tuition Waiver: A release from financial obligation for tuition to attend a Massachusetts state college, a community college, or university for former University of Massachusetts - Worcester Campus clinical employees who were hired by the University of Massachusetts Medical School prior to November 25, 1997 and who transferred to UMass Memorial.

Required Criteria for Procedure

1. Applications for tuition reimbursement must be completed through third-party administrator
2. For tuition reimbursement, a copy of the itemized paid tuition bill and a final grade indicating successful completion with a grade of "C" or better (or "Pass" on a Pass/Fail grading system) must be submitted through the third-party administrator's online self-service portal to obtain reimbursement. The reimbursement procedure must be initiated within 30 days of the completion of the course. If this is not possible, an extension must be requested through the Benefits department.
3. Courses for which the employee receives a grade of less than "C" or "Fail" on a Pass/Fail grading system are ineligible for assistance (e.g., C-, D+, etc.).