

POLICY HR45

Subject: EDUCATION AND
TUITION REIMBURSEMENT

Effective Date: AUGUST 1998

Applies to: ALL HOUSTON
METHODIST BUSINESS UNITS

Date Revised/Reviewed: NOVEMBER
2013

Originating Area: HUMAN RESOURCES

Target Review Date: NOVEMBER 2016

I. **POLICY STATEMENT**

- A. Houston Methodist is committed to maintaining and developing the overall knowledge of **our workforce by providing financial assistance to employees who pursue** formal degree programs.
- B. Employees with standard hours of 20 or more per week and who are not classified as Temporary or PRN are eligible to participate in the tuition assistance program as of their hire date if the following criteria are met:
 - 1. An employee must be actively employed (not on leave of absence, in an eligible status code, have standard hours of 20 or more per week and not be classified as Temporary or PRN at the time of the class start date, application approval, completion of the course(s), and reimbursement.
 - 2. An employee in an eligible status at the beginning of a class who changes to another eligible status within the duration of the class will be reimbursed according to the maximum reimbursement level of the status he was in more than half the duration of the class.
- C. Houston Methodist will cover 100% of tuition, books and eligible fees for courses related to a qualified degree program, subject to an annual cap limit of \$2,500 per year for employees with standard hours of 32 or more per week and who are not classified as Temporary or PRN and \$1,250 per year for employees with standard hours of 31 to 20 per week and who are not classified as Temporary or PRN. Covered expenses will be counted toward the annual cap limit based on the year in which the course(s) begins.
 - 1. Expenses which will be reimbursed for all qualified programs include, but are not limited to: tuition costs, including Thesis/Doctoral costs; matriculation fees; registration fees; lab fees, graduation fees; computer center fees; library fees; general usage fees; and textbooks.
 - 2. Expenses that will not be reimbursed under this policy include, but are not limited to: supplies and equipment; finance and deferred payment

charges; late registration fees; add/drop fees; penalties, identification card and health fees; insurance fees; recreational center fees; transportation to and from class; parking expenses; and certification, licensure, prep course and exam fees.

- D. Qualified degree programs must be related to the business of Houston Methodist and must be provided by an accredited institution as defined by the Department of Education. School accreditation can be verified using the [Office of Post Secondary Education College Search Tool](#).
- E. Eligible coursework includes all courses required to complete a qualified Associate's, Bachelor's, Master's or Doctoral degree program. Courses must not interfere with the employee's regular job nor detract from the employee's job performance.
 - 1. Certification expenses are not eligible for reimbursement under the tuition reimbursement program but may be paid from the departmental budget if managers believe such certifications will contribute to meeting departmental goals.
 - 2. Licensure expenses are not eligible for reimbursement under the tuition reimbursement program or any other policy. Employees are responsible for payment of their licenses in order to keep them current.
- F. Eligible tuition expenses will be reduced by any financial assistance (excluding loans) from sources other than this program (i.e. other Houston Methodist sponsored programs that reimburse for expenses that are eligible for reimbursement under this policy, Veteran's Administration, scholarships, grants, etc.)
- G. An employee must complete a course with an equivalent grade of C or better to be eligible for reimbursement.
 - 1. Classes that are based on a pass/fail grading system will be eligible for reimbursement with a passing grade.
 - 2. Classes, in which the employee receives an incomplete, withdrawal, or equivalent, are not eligible for reimbursement.

II. EMPLOYEE RESPONSIBILITIES

- A. To be eligible for funding consideration, an employee must submit a course approval application via the tuition assistance program website. Applications will be reviewed to ensure compliance with all program policies and to ensure the employee has funds available for the appropriate benefit period. For this reason, applications should be submitted at least 2 weeks, but no more than 60 days, prior to each semester, term or unique course start date. We encourage employees to submit the application before the beginning of the class to ensure that it is approved.
- B. Upon application approval, the employee must pay his/her tuition directly to his/her school and will be reimbursed upon successful course

completion.

- C. To be eligible for reimbursement the employee must submit the application, proof of successful course completion (grades) and an itemized invoice of tuition and fees within 90 days of course completion.
- D. Employees are responsible for immediately providing updated information on class changes and payments made for tuition and fees, including any additional financial aid received during the semester (must indicate amount and type of financial aid).
- E. Employees of The Methodist Hospital Physician Organization and Houston Methodist Research Institute need to discuss their request for tuition reimbursement with their department, so that it can be appropriately budgeted for each calendar year.

III. MANAGEMENT RESPONSIBILITIES

- A. Managers are responsible for reviewing course approval applications via the tuition assistance program website.
- B. Managers are responsible for obtaining approval from their Executive.
- C. Managers may base approval or denial of applications on the following criteria:
 - 1. Interference with an employee's regular job or job performance
 - 2. Relationship of the degree program to the business of Houston Methodist.
 - 3. Departmental budgetary constraints only when not communicated prior to budget process for the current calendar year (pertains to The Methodist Hospital Physician Organization and Houston Methodist Research Institute only)

IV. TUITION ASSISTANCE PROGRAM ADMINISTRATOR

The tuition assistance program is administered by Edlink, non-profit organization that has been administering tuition assistance programs since 1986.

- A. The Program Administrator is responsible for maintaining the tuition assistance program website and all program materials
- B. The Program Administrator reviews course applications to ensure compliance with all program policies and to ensure the employee has funds available for the appropriate benefit period.
- C. The Program Administrator notifies the employee's manager of applications that have met program guidelines and are ready for final review.
- D. The Program Administrator reviews reimbursement documentation and processes eligible reimbursements requests for payment.

V. HUMAN RESOURCES RESPONSIBILITIES

- A. Human Resources is responsible for establishing a process for applying for and receiving reimbursement.
- B. Human Resources processes funding requests from the Program Administrator to ensure prompt reimbursement of approved reimbursement requests.
- C. Human Resources ensures that taxes are withheld at the time of reimbursement in accordance with federal tax laws, if necessary.

IV. SIGNATURE OF APPROVING EXECUTIVE

Signed Original on File

Lauren P. Rykert
Senior Vice President, Human Resources

Date Signed

Revision	Date	Changed by	Revision Summary
6	November 2013	Janay Andrade	Updated to clarify that the student must have standard hours of 20 or more per week and may not classified as PRN or Temporary at the class start date.