



The Houston Methodist Tuition Reimbursement Program Frequently Asked Questions

You will find that many, if not all, of your questions about the Houston Methodist Tuition Reimbursement Program are addressed here and in the Reimbursement Program Policy. If you still have questions after reviewing these materials, please contact an EdLink customer service representative at houstonmethodist@edlinktuition.com or (866) 537-2235.

Who administers The Houston Methodist Tuition Reimbursement Program?

The Houston Methodist Tuition Reimbursement Program is administered by EdLink, which is jointly owned by CAEL and ACT and has more than 20 years of experience administering professional tuition assistance programs. EdLink is your single point of contact for assisting you in managing your tuition benefits.

How can I reach EdLink?

Website: <http://tamsonline.org/HoustonMethodist>

You are able to submit and check the status of your applications, upload and submit documentation and view payment information 24 hours a day, 7 days a week via the tuition reimbursement website.

Log on using your Houston Methodist employee ID. This seven digit number is your unique identifier and which can be found by viewing your record in API LaborWorkx or by logging into MARS. If you are a first time user or you have forgotten your password, click on "Login Help" and enter your Houston Methodist email address for your password reset information to be sent to.

You can reach a customer care representative 9:00 AM - 5:00 PM Central Time, Monday through Friday, via the following contact methods:

Email: houstonmethodist@edlinktuition.com

IVR: (866) 537-2235

You are able to check the status of your applications 24 hours per day, 7 days per week via our Automated Interactive Voice Response telephone system.

Phone: (866) 537-2235

After hours, you may leave a voice mail which will be returned by 5:00 p.m. the next business day.

Program Description

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. This Tuition Program is a reimbursement only program. We encourage you to submit your application to EdLink prior to your enrollment in a given course.

Tuition Reimbursement Program:

This program provides reimbursement to you upon successful completion of your course(s). You must pay for and successfully complete the course. Grades and Proof of Payment are then submitted to EdLink and you are reimbursed for the eligible expenses.

Who is eligible to participate in the Tuition Reimbursement Program?

Employees with standard hours of 20 or more per week and who are not classified as Temporary or PRN can participate in the tuition assistance program as of their hire date if the following criteria are met:

- An employee must be actively employed (not on leave of absence, in an eligible status code with standard hours of at least 20 per week and not classified as temporary or PRN) at the time of the class start date, application approval, completion of the course(s), and reimbursement.

What if I am on a Leave of Absence?

If you are on a Leave of Absence at any time during a given course, that course is not eligible and you will be unable to receive reimbursement.

What happens if I change positions or become ineligible?

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. If you change to an ineligible status, you will not receive reimbursement.

Do I need to submit an application before enrolling in a course/program?

To ensure your educational provider, degree program and field of study are eligible for participation in the Tuition Reimbursement Program. You are encouraged to submit applications via the tuition website at <http://tamsonline.org/HoustonMethodist> prior to your course begin date.

Applications should be submitted 2 weeks, but no more than 60 days, prior to the start of class.

Applications submitted more than 90 days after the class has finished will not be approved.

What Educational Programs are covered?

Eligible Degree Programs:

- Associate
- Bachelor
- Masters
- Doctoral
- Individual Courses*

*must follow the same field of study rules as an entire degree.

Eligible Fields of Study:

To qualify for tuition reimbursement, the program/course must relate to the business of Houston Methodist and must not interfere with your regular job nor detract from your job performance. When the program is approved, all courses required to complete that program (core and electives) will be covered.

What Educational Programs are NOT covered?

Excluded Degree Programs:

- Individual Courses not related to the business of Houston Methodist
- Certifications
- Prep courses
- Degree program entrance exams (e.g., SAT, ACT, GRE, LSAT, GMAT, MCAT)

Excluded Fields of Study:

- Programs considered hobbies or personal interest
- 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.
- 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.

What are the eligible educational providers?

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.

The school can hold any accreditation listed on the Office of Post Secondary Education College Search Tool.

You can verify a school's accreditation by:

- Using the [Office of Post Secondary Education College Search Tool](#),
- Checking the school's web site to verify accreditation, or
- Calling the school and asking for the name of their accrediting agency

What is the Featured Provider Network (FPN)?

EdLink has established a network of Colleges and Universities to increase the value of your tuition assistance dollars. Essentially, each institution has agreed to provide a discount and/or other

meaningful benefit to each of EdLink's client companies. The list of institutions participating in the EdLink FPN program is available on the program website.

What if I can't find my school or school location using "Search for Provider" on Step 1 of the online application?

If you are unable to find your school using the "Search for Provider" tool on Step 1 of the online application, please contact EdLink at houstonmethodist@edlinktuition.com or (866) 537-2235 for assistance. If the school meets the policy guidelines for accreditation, your school will be added to the list of eligible educational providers. If you can find your school but cannot find your school location, please select the nearest location.

What expenses and fees are covered?

Expenses that will be reimbursed 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
- textbooks (book costs should be included on the tuition reimbursement application)

What expenses and fees are NOT covered?

Expenses that will not be reimbursed include, but are not limited to:

- supplies and equipment
- finance and deferred payment charges
- late registration fees
- add/drop fees
- penalties
- identification card
- health fees
- insurance fees
- recreational center fees
- transportation to and from class
- parking expenses
- Certification, licensure, prep course and exam fees.

Does my manager need to approve my coursework?

Yes, your direct manager will be asked to provide final approval of all applications submitted.

EdLink will initially review the application to ensure it meets the Houston Methodist Tuition Reimbursement Policy guidelines. Managers are responsible for:

- Reviewing approval applications via the tuition reimbursement website upon receipt of the notification email.
- Obtaining funding approval from the Executive responsible for employee's department.
- Managers may base approval or denial of applications on the following criteria:
 - Interference with an employee's regular job or job performance
 - Relationship of the degree program to the business of Houston Methodist.

- Departmental budgetary constraints (pertains to The Methodist Hospital Physician Organization and the Houston Methodist Research Institute)

You will receive an email notification of your manager's approval or denial of your application.

Is there a maximum benefit amount?

Covered expenses will be counted toward the annual cap limit based on the year in which the course(s) begins. For example, if courses begin in 2013, the reimbursement amount will be counted against the employees 2013 annual cap limit regardless of what year for which the course is paid. Houston Methodist will cover 100% of tuition, books and eligible fees for courses related to a qualified degree program, subject to a limit of:

- Employees with standard hours of 32-40 per week and are not classified as temporary or PRN limit is \$2,500.
- Employees with standard hours of 20-31 per week and are not classified as temporary or PRN limit is \$1,250.

Is there a minimum grade requirement?

Upon completion of your course you must submit a copy of your official grade report/transcript to EdLink within 90 days of your course end date.

To be eligible to receive reimbursement:

- C (C- minus is not acceptable) or better for all graded courses
- A "pass" will be accepted from courses offering only a pass/fail grading option.

Grades should be submitted using the upload feature on the tuition website

<http://tamsonline.org/HoustonMethodist>.

When would I need to make a repayment?

You will not be asked to repay tuition amounts. If a course was not successfully completed, reimbursement will not be issued.

Is there a Stay or Work Requirement?

There is no work commitment or stay requirement associated with the use of the tuition reimbursement benefit.

Are my tuition reimbursements taxable?

Taxation of employer-provided education reimbursement is governed by Internal Revenue Code Section 127, which exempts from taxation, education reimbursement payments up to a maximum of \$5,250 for each associate per calendar year. Amounts over \$5,250 may be taxed.

With the maximum annual cap limit possible in a given year being \$2,500, the full amount is considered exempt from taxation.

Application Processing**How do I submit an Application using the tuition website?**

To log in to the website, your default user name is your seven-digit Houston Methodist Employee ID and the password you setup and then follow the steps below.

There are 4 steps to submitting an application for review:

1. Program Information
 - a. Select your program
 - b. Review your contact information
 - c. Enter/review educational provider information
2. Course Information
 - a. Enter your educational objectives and specific term information
 - b. Enter your course(s)
 - i. Up to 4 courses can be submitted on a single application. The courses should have the same or similar start and end dates and be for the same school. Different terms or schools must be submitted on separate applications.
 - c. Enter your course expense(s)
3. Agreements
 - a. Enter any financial aid you will receive
 - b. Read and agree to the participation agreement
4. Review & Submit
 - a. Confirm that all information is complete and accurate by submitting the application for review

EdLink will review your application for compliance to your company's tuition reimbursement policy. If further information is needed, you will be contacted via email requesting the required information.

How do I find out if my application has been approved?

You will receive an approval notification via email. We also encourage you to monitor the status of your application online at <http://tamsonline.org/HoustonMethodist> or through the IVR at (866) 537-2235

How do I request reimbursement for my course/term charges?

Within 90 days of your course end date, the following documentation must be submitted:

- Copy of grade report/transcript that includes:
 - Student name
 - School name
 - Course name
 - Grade received
- Statement of charges for your course/term that includes
 - Student name
 - School Name
 - Course names or term (information that shows when/what the charges are for)
 - Tuition amounts
 - Itemized list of specific fees charged
 - Shows associated charges have been paid for in full
 - If paid using financial aid, must list the type of financial aid received.

EdLink will process your tuition reimbursement application within 5 days of receipt of the above documentation. You will be sent an email notification that your application has been processed

for payment. Within 2-3 weeks of receipt of the email notification, EdLink will mail a check directly to your home address.

Required documents can be uploaded directly to the tuition website, emailed as an attachment or faxed using the fax cover sheet.

Upload documents

You are able to upload documents directly to an application by clicking the application number on your Task List or My Application History on your Dashboard page.

1. Select "Submit Documents" from the menu on the right side of your screen. A pop up window will appear.
2. From the drop down menu, select the type of document you are submitting.
3. Click the "browse" button to locate the document on your computer.
4. Click submit.

*For uploaded grades you will be able to select the grade you received. You are still required to upload your grade report. Be sure the grade you select matches the grade listed on the transcript/grade report you upload.

Upon successful upload, you will be able to view the documents now attached to the application in the "Supporting Documentation" section of the Application Summary page.

Faxing Documents

The Fax Cover Sheet is provided to enable you to streamline the process of submitting paperwork, such as your grades or proof of payment. It helps avoid confusion by automatically including pertinent information like your application number and the type of documents you are sending. By clicking the application number on your Task List or My Application History on your Dashboard page you can access the fax coversheet.

1. Select "Submit Documents" from the menu on the right side of your screen. A pop up window will appear.
2. You can locate the Fax Cover Sheet button at the bottom of the pop up window.
3. Fill in the blanks on the Fax Cover Sheet and click print.
4. Fax the cover sheet with your documents.

What if I receive a grant or other financial aid from my school or other sources?

Participants receiving grants, scholarships and/or Veteran's Administration benefits should fully utilize these funding sources prior to requesting funds through the tuition reimbursement program. All financial aid must be disclosed on the tuition reimbursement application when used concurrently with the Tuition Program.

What happens if my application is incomplete?

You will receive an email that requests any missing information we need in order to continue the review/approval process. The review process will resume upon receipt of your missing information.

Can my Application or Payment be denied?

Applications can be denied if they do not meet your company's tuition reimbursement policy guidelines. Your eligibility, the field of study, degree program or educational provider may not

meet the requirements for approval. Information regarding the exact reasons your application was denied are available via the eligibility event history table on your application.

Payments can be denied if you are not eligible, unsuccessful grades are submitted or documentation is submitted outside of the submission deadlines. Information regarding the exact reasons your payment was denied are available via the eligibility event history table on your application.

If you feel your tuition application was denied in error, you may submit a request for reconsideration to EdLink by e-mail at houstonmethodist@edlinktuition.com. Reconsideration requests must be submitted within 30 days of the original denial of tuition reimbursement and must include:

- Your name and Employee ID,
- Your manager's name,
- An explanation of why you should be reconsidered, and
- Any relevant documentation to substantiate your claim

How do I make a correction to an application?

In some cases, you may drop, withdraw, change, or reschedule a course that you originally submitted on your application. Also, course numbers or titles may be different than what you originally entered. If this occurs, to avoid delays and confusion during the payment process, you must correct your originally submitted application as soon as possible.

Correcting application information:

Select the appropriate application from the My Application History table on your Dashboard. You will be able to edit any application if it is in one of the following statuses:

- "Saved - Not Submitted"
- "Submitted - Incomplete"
- "Submitted - Pending Review"

Make your desired changes, proceed to Step 4 of the application wizard, and click "Submit" to resubmit your application for review.

For applications in any other status, if the information originally submitted on your application changes because you drop, withdraw, or reschedule a course, you can cancel your application by clicking the application number on your My Application History on your Dashboard and following the instructions under Cancel Application on the right hand side of the screen.

For all other types of changes you must notify EdLink immediately by contacting a customer care representative so that your application can be updated. The customer care representative will provide you with instructions or next steps.

If your application is in a paid status or is being processed for payment, a change cannot be made. Contact a customer care representative for further instructions.

What happens if I leave Houston Methodist while attending courses?

If your employment ends before the successful completion of a course and payment of the reimbursement benefit, you are not eligible for reimbursement for that course. To receive reimbursement, you must remain employed through the duration of your courses and at the time of reimbursement.