

Policy Title: Tuition Reimbursement	Policy Number: NW.HR.47.001
Owner Department: Human Resources	Effective Date: 1/1/2016
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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 Northwest 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)

3.2 All regular full-time and part-time employees scheduled 20 or more hours per week are considered eligible employees if they have been in an active status for the following period of time prior to the course start date:

3.2.1 90 consecutive calendar days for non-union hourly and salaried employees, employees represented by IUOE Local 701, and unions in the National Labor Management Partnership (LMP)

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

5.0 Provisions

5.1 Eligibility Criteria

5.1.1 Courses are to be taken on the employee's own time and outside regular working hours. Course attendance is not compensable working time unless otherwise required by federal or state law, or by the applicable collective bargaining agreement. Employees represented by a union in the LMP may use tuition reimbursement in conjunction with any applicable education leave for eligible courses.

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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 Also eligible for reimbursement are courses, certificate programs, workshops, seminars, professional conferences, educational meetings, and special events taken/attended for continuing education units (i.e., CEU, PDU, CME, Contact Hours) in order to advance skills and obtain or maintain position-required licensure, degrees, or certification, provided they are taken at an accredited institution, professional society, or governmental agency or authorized by these organizations to deliver credentials on their behalf.
- 5.1.2.3 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 program.
- 5.1.3 When an employee is receiving alternative financial aid for an eligible course through internal or external programs or opportunities:
 - 5.1.3.1 If the employee is required to pay back the financial aid, the employee is eligible for reimbursement under this policy.
 - 5.1.3.2 If the employee is NOT required to pay back the financial aid, the employee is not eligible for reimbursement under this policy. Examples of financial arrangements that are not reimbursable include: loan forgiveness programs, waivers, grants, fellowships, scholarships, and military education benefits.

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 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 the following amounts per calendar year, based on term or class start date:
 - 5.3.1.1 \$3,000 – non-union hourly and salaried employees, employees represented by IUOE Local 701, and unions in the National Labor Management Partnership (LMP)
- 5.3.2 Reimbursement is paid by Regional Human Resources.

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5.3.3 Reimbursement is limited to:

- 5.3.3.1 course/class tuition
- 5.3.3.2 required entrance, registration, student activity fees
- 5.3.3.3 required textbooks and reading materials used to complete assignments, such as white papers and business reviews
- 5.3.3.4 laboratory fees
- 5.3.3.5 travel, room/lodging expenses for non-academic courses, certificate programs, workshops, seminars, professional conferences, educational meetings, and special events taken/attended for continuing education units (i.e., CEU, PDU, CME, Contact Hours) in order to advance skills and obtain or maintain position-required licensure, degrees, or certification, provided they are taken at an accredited institution, professional society, or governmental agency or authorized by these organizations to deliver credentials on their behalf, as identified in section 5.1.2.2. [NOTE: Travel is included in the reimbursement maximum and is not available for college undergraduate or graduate degree programs. Only certain travel expenses are reimbursable. See additional information on MyHR, under Education Assistance, including how to submit a travel application and supporting documents.]
 - 5.3.3.5.1 \$Up to \$500 per calendar year as part of the reimbursement maximum – non-union hourly and salaried employees, employees represented by IUOE Local 701, and unions in the National Labor Management Partnership (LMP)

5.3.4 The following are not reimbursable expenses:

- 5.3.4.1 food expenses
- 5.3.4.2 membership or association fees, except when this fee enables access to CEUs. [NOTE: CEUs must be completed and submitted annually and the membership reimbursement is prorated based on the number of years purchased.];
- 5.3.4.3 certification or license fees;
- 5.3.4.4 certification exam prep packages and courses that do not provide passing credential and credit or units from an eligible entity;
- 5.3.4.5 cost of periodicals, reference books, software, supplies, uniforms, computer or other equipment or other fees related to the course not included in section 5.3.3;
- 5.3.4.6 advanced placement tests and credit by exam in lieu of course, including College-Level Examination Program (CLEP);
- 5.3.4.7 application fees;
- 5.3.4.8 deferred payment fees; and

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5.3.4.9 testing/exam fees and graduation fees not specifically included in an approved course/program.

5.4 Application and Reimbursement Procedure

NOTE: Additional information regarding tuition reimbursement is available on MyHR, under Education Assistance.

5.4.1 Employees must apply for tuition reimbursement (TR) prior to the course start date to ensure supervisor acceptance and review of employee and course eligibility. All submitted TR applications are subject to further review by NTRA for employee eligibility, course/school acceptability, and available TR benefit, and may be denied if the application does not meet the policy requirements.

[NOTE: NTRA does NOT pre-approve all applications. It is the employee’s responsibility to read and understand the policy.]

5.4.2 Employees submit TR applications directly online through the “Education Assistance” link on My HR.

5.4.3 Reimbursement documents (proof of course/event charges and payment, payment invoices and receipts showing course name, cost and method of payment, and class grade reports or certificate completion) must be returned to NTRA within 90 days after the term or class end date. Reimbursement documents must be legible, uneditable (screenshot vs. text copy/paste) are subject to review to support any requested tuition reimbursement. Employees should upload all reimbursement documents directly into their TR application from their MyHR Education Benefit Summary page.

5.4.4 Employees should discuss their course plans with their supervisor. If applicable, supervisors must approve estimated travel expenses before the course/travel begins.

5.4.5 Employees’ supervisors are required to review and acknowledge employees’ tuition reimbursement applications.

5.5 Your Education Coordinator for National Tuition Reimbursement Administration (NTRA) may be contacted at:
 Phone: 503-813-4745, option 1
 Fax: 1-877-201-0081
 E-mail: NW-HRServices@kp.org, include 'Tuition Reimbursement' in the subject line
 Mail: Education Coord / HR / KPB-13
 For application status, employees should refer to their Education Summary page on MyHR.

6.0 References/Appendices

n/a

7.0 Approval

TBD

Revision History

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- Original Effective Date: 5/7/2013
- Revision Effective Dates: 1/1/2015