PURPOSE:
To define the guidelines for the administration of the Kettering Health Network’s Employee Educational Assistance Program. The goal is to:
1. provide opportunities for career advancement,
2. reduce vacancies through workforce development and
3. proactively manage the strategic workforce needs of the Network through collaboration with Clinical Professional Development, Leadership Institute, the County Workforce Policy Board, Kettering College for Medical Arts and other educational institutions.

POLICY:
The Kettering Health Network provides career development to those employees desiring to further their education and to enhance skills in health care and related fields through an approved, accredited educational institution.

PROCEDURE:
Course-by-Course Tuition Assistance

● General Eligibility
In order to be eligible for course-by-course tuition assistance, the employee must:
(1) be a regular full-time or part-time employee working a minimum of sixteen (16) hours per week (.4 FTE or greater);
(2) has completed at least ninety (90) days of employment prior to submitting the course-by-course application;
(3) not currently involved in disciplinary action and are a middle to high performer (has not received a written warning in the last 6 months and a final written warning in the last 12 months);
(4) has completed a Career Development Plan which has been approved by Human Resources;
(5) course(s) that are submitted are aligned with the needs of the KHN

● Course Restrictions
The course work pursued must:
1. be aligned with the needs of Kettering Health Network
2. be related to the employee’s present position; and / or
3. toward a promotion in a documented area of need within the Kettering Health Network.

Administrative Policy
Course work must be taken for credit through an approved accredited educational institution. Certifications, seminars, convention-related educational presentations, conferences, or courses in sports, games, or hobbies are not reimbursable under this program.

- **Benefit Limitations**
  Please refer to the Annual Reimbursement Schedule on the intranet or in Human Resources to determine the level of reimbursement. The amount is based upon the employee’s FTE status at the time of reimbursement.

The employee must submit a FAFSA (Free Application for Federal Student Aid) form each year. If an employee receives any form of financial assistance (i.e., scholarship, grant, WIA, TANF, etc.) from a third party, benefits for tuition assistance under this program will be limited to the employee's outstanding tuition balance after consideration of third party assistance. Employees will be asked to provide proof of any financial assistance provided by a third party, this should be indicated on the fee bill from the education provider.

Reimbursement for tuition assistance is cumulative for annual and lifetime maximums.

- **Application Procedure**
  An employee wishing to participate in the Course by Course program must first complete a Career Development Plan and meet with one of the designated counselors. Employees will then be notified if they are eligible to apply for the Course by Course tuition assistance.
  Upon receiving that approval the employee can obtain a Course by Course application available in the Human Resources department or on the intranet. The application must be submitted to the Human Resources department with all necessary and required information completed as well as the approval of the employee’s department manager / director. The manager and director should complete the appropriate section of the application. The application must be turned in to Human Resources at least 2 weeks prior to the start of the course(s). The employee is to turn in the application, along with a copy of the completed registration form or fee bill from the education provider, to Human Resources. In addition, the employee must meet all course restrictions, benefit limitations, application procedures, and reimbursement requirements in order to be eligible for Course by Course tuition assistance. The application will be reviewed and the employee will be notified if the course(s) has been approved through the Course by Course tuition assistance. Incomplete requests will be returned to the employee and could result in not being approved.
The employee will be meeting on an annual basis with a designated counselor to review and update his/her Career Development Plan. At this time, approval in the Course by Course tuition assistance program could change.

- Reimbursement Requirements
  
  In order to receive reimbursement for Course by Course tuition assistance, an employee must obtain a final grade of “C” or better in each course the employee is seeking assistance. A copy of the employee's grade, or other suitable documentation showing a "C" grade or better was obtained, an expense summary form, a fee bill, and proof of payment must be submitted to Human Resources within 6 months of completion of the course. If the employee does not achieve the above requisite grade, the employee is ineligible for reimbursement.

  Reimbursement can be made for tuition, fees, and books associated with the course(s) for which the employee seeks assistance. This program does not provide assistance for fees related to registration, transportation, meals, lodging, the purchase of tools or supplies, or other expenses that are not considered tuition, books or lab related fees.

  Reimbursement will be made on the scheduled check issuance cycle within two pay periods following submission of all required documentation. The employee must be active and in a full-time or part-time (.4FTE or greater) status throughout the course and at the time of reimbursement. If an employee’s status changes during the course-work or at the time of reimbursement, the employee will be reimbursed at that rate. If the employee’s status changes to resource during the course-work or at the time of reimbursement, the employee is ineligible for reimbursement. If the employee is currently out on a leave of absence, the employee is unable to receive reimbursement until they return to work and provide the appropriate documentation within 6 months of completing the course(s).

End of the Year Reimbursements. Employees must submit the required paperwork by noon on the second Friday of December in order to have the amount applied to the current year’s tuition allotment. Incomplete forms or missing paperwork may cause reimbursement to be carried forward to the new year and applied to the next year’s tuition maximums or not to be reimbursed at all.
● Employment Commitment
The employee agrees to remain employed in a full or part-time capacity for 2080 hours after the employee's final reimbursement under this program.

If the employee changes status to pool or employment is terminated with the Kettering Health Network for any reason other than death or disability during the time the employee is completing the course-work or during the commitment period, the entire assistance amount will be considered a repayable loan. Kettering Health Network reserves the right to deduct a portion or the entire amount owed from your final paycheck or other payback arrangements may be approved by Human Resources.

Total Curriculum Tuition Assistance

● General Eligibility
In order to be eligible for Total Curriculum tuition assistance, the employee must:
1. be a regular full-time or part-time employee working a minimum of sixteen (16) hours per week (.4 FTE or greater);
2. has completed at least twelve (12) months of employment prior to participation;
3. enrolled in a degree program that is aligned with the needs of the Kettering Health Network as determined by internal and external analysis;
4. not currently active in the disciplinary process and are a middle to high performer (has not received a written warning in the last 6 months and a final written warning in the last 12 months)
5. has completed a Career Development Plan and been approved by Human Resources

● Program and Course Restrictions
An employee seeking Total Curriculum tuition assistance must be enrolled in a degree program at an approved accredited educational institution. The degree program must be aligned with the needs of the Kettering Health Network.

Reimbursement is not available under this program for courses in sports, games, or hobbies.

If approved for Total Curriculum tuition assistance, the employee agrees to complete all requirements necessary for the granting of the approved degree and must take at least one class per semester / quarter each year until the completion of the degree.
Benefit Limitations
Please refer to the Annual Reimbursement Schedule on the intranet or in Human Resources to determine the level of reimbursement. The amount is based upon the employee’s FTE status at the time of reimbursement.

The employee must submit a FAFSA (Free Application for Federal Student Aid) form each year. If an employee receives any form of financial assistance (i.e., scholarship, grant, WIA, TANF, etc.) from a third party, benefits for tuition assistance under this program will be limited to the employee's outstanding tuition balance after consideration of third party assistance. Employees will be asked to provide proof of any financial assistance provided by a third party.

Reimbursement for tuition assistance is cumulative for annual and lifetime maximums. For example, any reimbursement received by an employee under the Course by Course Tuition Assistance plan, prior to the approval of their Total Curriculum application, will be reflected in the lifetime maximum benefits under the Total Curriculum tuition assistance.

Application Procedure
The applicant must complete a Career Development Plan and meet with one of the designated counselors in Human Resources prior to completing a Total Curriculum application. If the Career Development Plan is approved then the employee is able to turn in the Total Curriculum application with all necessary and required information completed. The employee must meet all course restrictions, benefit limitations, application procedures, and reimbursement requirements in order to be eligible for Total Curriculum tuition assistance. If the Total Curriculum application is not complete, the employee may be denied for tuition assistance. Total Curriculum applications will be approved one time a year. The schedule of when applications are approved is located on the intranet and in the Human Resources department. Total Curriculum applications for master’s or PhD’s will be sent through an executive approval process which is separate from the approval process for associate’s and bachelor degrees.

The applicant must provide the following information with the completed Total Curriculum application:

1. Proposed curriculum listing of all required courses to complete the degree.
2. Copy of transcripts of college work completed to date, if applicable. An employee seeking graduate or post-graduate educational assistance must submit final college transcripts indicating their undergraduate or graduate degree.

3. Documentation demonstrating that the degree the applicant is pursuing is related to the employee’s present position and will lead to improvement of the employee’s present job effectiveness, or the degree relates to a documented area of need within the Kettering Health Network.

4. Evidence of above average work performance of the applicant (positive performance appraisals, letters of commendation, supervisor/department head letter of recommendation.)

5. Cost of the program and any other third party funding (ex. grants, scholarship) other than KHN tuition assistance programs

Once the employee's application is complete and all required materials have been received by Human Resources before the deadline, the employee will receive after the deadline:

1. Notification of approval or denial.
2. Expense Summary form(s).

**Reimbursement Requirements**

In order to receive reimbursement for Total Curriculum tuition assistance, an employee must obtain a final grade of “C” or better in each course the employee is seeking assistance. A copy of the employee's grade, or other suitable documentation showing a "C" grade or better was obtained, must be submitted to the Human Resources department within 6 months of completion of the course (s). If the employee does not achieve the above requisite grade, the employee is ineligible for reimbursement. In addition, an employee seeking reimbursement must submit the following:

1. Completed Expense Summary form.
2. Original itemized statement of tuition and fees (fee bill).
3. Proof of payment by an original receipt for tuition, fees, and books (i.e. cancelled check or credit card statement or statement from the education institute).
4. Proof of any financial assistance provided by a third party.

---

**Administrative Policy**
Reimbursement can be made for tuition, fees, and books associated with the degree program and course(s) for which the employee seeks assistance. This program does not provide assistance for fees related to registration, transportation, meals, lodging, the purchase of tools or supplies, or other expenses that are not considered tuition, books, or lab related fees.

Reimbursement will be made on the scheduled check issuance cycle within two pay periods following the submission of all required documentation. The employee must be active and in a full-time or part-time (.4 FTE or greater) status throughout the program and course-work and at the time of reimbursement. If an employee’s status changes during the program or at the time of reimbursement, the employee will be reimbursed at that rate. If the employee’s status changes to resource during the program or at the time of reimbursement, the employee is ineligible for reimbursement. If the employee is currently out on a leave of absence, the employee is unable to receive reimbursement until they return to work and provide the appropriate documentation within 6 months of completing the course(s).

End of the Year Reimbursements  Employees must submit the required paperwork by noon on the second Friday of December in order to have the amount applied to the current year’s tuition allotment. Incomplete forms or missing paperwork may cause reimbursement to be carried forward to the new year and applied to the next year’s tuition maximums or not to be reimbursed at all.

- Employment Commitment
  The employee agrees to remain in full-time or part-time employment while pursuing the approved degree program. A change of employment status may affect the amount of reimbursement as previously described and participation in the Total Curriculum tuition assistance program may be jeopardized.

  The employee agrees to remain employed in a full or part-time capacity for 4160 hours after the completion of the degree or final reimbursement, whichever is last. If the employee has applied for a master’s or PhD and has been approved through the executive approval process, the employee agrees to remain employed in a full or part-time capacity for 6240 hours after the completion of the degree or final reimbursement, whichever is last.

  If the employee changes status to pool or employment is terminated with the Kettering Health Network for any reason other than death or disability during the time the employee is completing the degree program or during the commitment period, the entire assistance amount will be
considered a repayable loan. Kettering Health Network reserves the right to deduct a portion or the entire amount owed from your final paycheck or other payback arrangements may be approved by Human Resources.

● **Annual Review Process**
Employees approved under the Total Curriculum and Course by Course programs will be required to meet with a designated counselor for an annual review of their progress and Career Development Plan. At this time, approval in one of these programs could change.

Kettering Health Network will comply with all Internal Revenue Services (IRS) regulations and guidelines. Kettering Health Network will provide the appropriate information to the employee and the IRS, should this be necessary under the regulations in effect at the time the employee is under the Employee Career Development Policy.

This policy is subject to change. The policy that is followed is that in effect at the time of reimbursement.

**SPONSORING DEPT:** Human Resources  
**DATE OF ORIGIN:** 09/09/01  
**LAST REVIEWED:** 12/07  
**DATE APPROVED:** 01/01/08  
**APPROVED BY:** KMC Executive Council  
**DATE EFFECTIVE:** 01/01/08