

AdvocateAuroraHealth

System Policy

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	EFFECTIVE DATE:	: 1/1/2020
	LAST REVIEW/REVISION DATE:	Date Last Modified 2/7/2020

I. PURPOSE

This document outlines Advocate Aurora Health’s Education Assistance Program.

II. SCOPE

Advocate Aurora Health’s Education Assistance Program offers enhanced financial assistance and advising for eligible team members who pursue continued education while employed with Advocate Aurora Health. The program covers education that applies to improvement and/or enhancement of a team member’s knowledge, skills, or current/next position with Advocate Aurora Health.

III. DEFINITIONS/ABBREVIATIONS

Education Assistance Programs

A. Eligibility

1. All active, Full-time (0.9 - 1.0 / 72 – 80 hours), Part-time (Minimum .5 FTE / 40 hours) at time of application and payment processing

- a. Full-time team members: \$5,000 per calendar year
- b. Full-time team members BSN/MSN/DNP at preferred partner school: \$7,200 per calendar year
- c. Part-Time: \$2,250 per calendar year
- d. Part-time BSN/MSN/DNP at preferred partner school: \$3,168 per calendar year

2. Team members are eligible to apply for courses that begin after their date of hire

3. Status changes and terminations

- a. If a team member voluntarily changes from full-time to part-time employment status or vice-versa during the course, the reimbursement will be based on the employment status at the time of payment processing.
- b. If a team member voluntarily terminates or changes to a non-benefit status before the course ends, the team member is not eligible for education assistance.
- c. If a team member involuntarily terminates employment due to reduction in workforce, is moved to a non-benefits eligible position or is moved from full-time to part-time status with Advocate Aurora, due to position elimination or restructuring, before the course ends, course(s) that were approved and started prior to team member’s change in status will be reimbursed upon successful completion.

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4. Leave of Absences

- a. Team members on leave are eligible to receive reimbursement for successfully completed courses on an application that was previously approved but are not eligible to submit new applications for subsequent terms while on leave.

B. Approvable Education

1. Education Assistance Programs

- a. All educational programs must be related to the team member's current job or an established career path within Advocate Aurora.
- b. Includes: tuition, books and fees
- c. All individual courses and courses related to a degree or certificate program must be provided by an institution holding Regional or National accreditation recognized by the U.S. Department of Education. School accreditation can be verified via the U.S. Department of Education's Office of Post-secondary Education (OPE) website:
<https://ope.ed.gov/accreditation/Search.aspx>.
- d. Certifications/designations must be provided by a professional association, certifying body or institution authorized to award the industry accepted certification/designation.
- e. All annual benefit amounts are based on course end date
- f. See chart below:

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Education Program	Eligibility Criteria	Annual Benefit Amount based on course end date
Associate's Degree Bachelor's Degree	Includes all credit-bearing courses taken as part of an approved degree program, which will receive a grade, and prior learning assessments and tests used to document knowledge for the purpose of granting credit toward an approved degree (e.g. - CLEP, ACE, DANTES).	<p>Full-time team members: \$5000 per calendar year</p> <p>Part-time: \$2,250 per calendar year</p>
Master's Degree <i>(including MBA and EMBA)</i> Doctorate Degree <i>(including PhD and JD)</i>	Includes all credit-bearing graduate level coursework taken as part of an approved graduate degree program and which will receive a grade.	
Degree Programs: Individual Courses	Each course must be credit-bearing and receive a grade and must be directly related to an employee's current position or career path that aligns with Advocate Aurora's business needs.	
Certificate Programs	Includes all credit-bearing courses and exams required to complete an approved Certificate program. Certificate programs must have a measurable completion requirement beyond attendance and participation.	
Certification/ Designation	Includes courses and exams required to achieve an approved Certification/Designation; fees for re- certifications are also approved. Certifications must be approved by team member's manager.	
Bachelor of Science in Nursing, Master of Science in Nursing, or Doctor of Nursing Practice	Includes all credit-bearing courses taken as part of an approved Bachelor or Master of Science in Nursing program which will receive a grade, taken at the following schools: Chamberlain University, Illinois State University, Lewis University, Olivet Nazarene University, University of Illinois at Chicago, Alverno College, Concordia University, University of Wisconsin – Milwaukee and University of Wisconsin - Oshkosh.	<p>Full-time team members: \$7,200 per calendar year</p> <p>Part-time team members: \$3,168 per calendar year</p>

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C. Non-Approvable Education

1. Meals, lodging, transportation, parking fees, tuition deferral fees, student activity fees, tools or supplies (other than textbooks) that can be kept after completing the course of instruction.
2. Majors that are not job-related or are not a part of a career path relevant for Advocate Aurora.
3. Individual courses that are not job-related or do not issue grades or college credit.
4. Individual courses for sports, recreation or hobbies, unless part of a degree program.
5. Continuing Education Units (CEUs) or contact hours.
6. Seminars and programs, conferences, workshops or conventions.
7. Programs offering “Certificates of Attendance, Attainment, Achievement, or Completion.”
8. Individual computer courses that are non-credit or not for degree or certification or recertification.
9. Certifications that are considered a job requirement per the team member’s job description.
 - a. Repetitive, periodic education (e.g., CEUs) required to achieve or maintain a certification or job requirement (e.g. CPR, ACLS, PALS, BLS, etc.).
10. Certifications not approved by team member’s manager.
11. Review courses or re-testing for re-certifications.
12. Professional/technical licensures registration and renewal fees or exam fees.
13. Placement exams (e.g. Graduate Record Exam – GRE).
14. Audited courses.
15. Fees for membership in national organizations necessary to sit for certification exams.
16. Education to educate (e.g. Train-the-Trainer).

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D. Reimbursement

1. All individual courses and courses related to a degree or certificate program must be completed with a minimum grade equivalent of C- or better. Courses that are based on a pass/fail grading system must be completed with a passing grade. Courses in which a team member receives an incomplete, withdrawal, or equivalent grade are ineligible.
2. Certification/Designation exams must be passed at a level eligible to earn the industry accepted certification/ designation. If the exam or individual course is not passed, neither the prep course/materials (including books) nor the exam will be reimbursed.
3. Tuition, books and eligible fees will be covered up to the annual calendar year benefit amount stated above. Payment amounts are applied to the annual benefit year based on course end date or exam date for certifications.

Legacy Aurora BSN Grandfathering Policy

A. Eligibility

1. Active, Full-time (0.9 - 1.0 / 72 – 80 hours), Part-time (Minimum .5 FTE / 40 hours) team members who participated in the legacy Aurora BSN completion program in 2019 will be grandfathered into the enhanced cap benefit until completion or December 31, 2024 (whichever is sooner).
 - g. In accordance with the original policy, team members must be officially admitted to and actively pursuing an accredited bachelor's degree in Nursing (BSN)
 - h. Includes: tuition, books and fees
 - i. All individual courses and courses related to a degree or certificate program must be provided by an institution holding Regional or National accreditation recognized by the U.S. Department of Education. School accreditation can be verified via the U.S. Department of Education's Office of Post-secondary Education (OPE) website:
<https://ope.ed.gov/accreditation/Search.aspx>.
 - j. All annual benefit amounts are based on course end date

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Reimbursement schedule based on assigned FTE at time of payment:

FTE/Standard Hours per	BSN Maximum Annual Reimbursement Amount
0.5 - .59 FTE (40-47 hours)	\$3,750
0.6 - .69 FTE (48-55 hours)	\$4,500
0.7 - .79 FTE (56-63 hours)	\$5,250
0.8 - .89 FTE (64-71 hours)	\$6,000
0.9 – 1.0 FTE (72-80 hours)	\$7,500

2. Status changes and terminations

- a. Team member must maintain continuous enrollment (Fall/Spring) in order to be eligible for the grandfathering program.
- b. If a team member changes schools, they must be admitted into the BSN program to maintain eligibility. Any changes to Field of Study, will cause ineligibility.
- c. If a team member voluntarily changes from full-time to part-time employment status or vice-versa during the course, the reimbursement will be based on the employment status at the time of payment processing.
- d. If a team member voluntarily terminates or changes to a non-benefit status before the course ends, the team member is not eligible for education assistance.
- e. If a team member involuntarily terminates employment due to reduction in workforce, is moved to a non-benefits eligible position or is moved from full-time to part-time status with Advocate Aurora, due to position elimination or restructuring, before the course ends, course(s) that were approved and started prior to team member's change in status will be reimbursed upon successful completion.

IV. **POLICY**

Education Assistance Program:

The Education Assistance Program provides supplemental financing for team members who continue their education while employed with Advocate Aurora Health (Advocate Aurora). The program covers education that applies to improvement and/or enhancement of a team member's knowledge and skills in their current position or for one that they can reasonably expect to attain within Advocate Aurora.

Although attainment of educational goals often leads to improved performance and new career opportunities, participation in this program does not guarantee a specific career result such as a promotion or salary increase. Advocate Aurora reserves the right to terminate or amend this Education Assistance Program at its sole discretion.

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Legacy Aurora BSN Grandfathering Policy:

This policy offers continued coverage for team members who participated in the legacy Aurora BSN program (in 2019) with an enhanced cap through December 31, 2024. The Education Assistance Program provides supplemental financing for team members who continue their education while employed with Advocate Aurora Health (Advocate Aurora). The program covers education that applies to improvement and/or enhancement of a team member's knowledge and skills in their current position or for one that they can reasonably expect to attain within Advocate Aurora.

Advocate Aurora reserves the right to terminate or amend this Education Assistance Program at its sole discretion.

V. PROCEDURE

A. Application Guidelines

1. To be eligible to receive education assistance, a team member must submit a course approval application for each quarter, semester or academic term.
2. Applications should be submitted prior to the course start date but no later than 30 days after the course start date. Applications will not be accepted more than 30 days after the course start date.
3. Applications will be reviewed for policy compliance by the program administrator and the employee will be notified via email of application approval or denial.
4. Team members must receive manager approval for certifications and recertifications; all other programs will provide managers with notification of approved applications.

B. Reimbursement Guidelines

1. Upon application approval, the team member is responsible to make all required payments directly to his/her school and will be reimbursed upon successful course completion.
2. The team member is responsible for submitting proof of successful course completion (grades) and an itemized invoice of tuition and fees and proof of payment (or deferral agreement) within 60 days after course completion in order to receive reimbursement of eligible expenses.
3. Team members receiving educational grants, scholarships, military benefits or other discounts must disclose all such financial assistance and provide documentation of how the funds were applied.

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4. Funds received from such sources will be deducted first from any expenses not covered under the program. Any remaining funds received will be deducted from eligible tuition and fees.

5. Financial Aid received in the form of student loans will not be deducted.

6. Course books are not reimbursable if course is not passed.

C. Tax Guidelines

1. In compliance with IRS regulations (section 127), employer provided educational assistance is exempt from taxation up to a maximum of \$5,250 per calendar year.

2. Amounts over \$5,250 may be exempt from taxation if the education qualifies as work related education (section 132).

3. Taxes will be assessed for non-qualifying work-related education if, at the time of payment processing, the team member's total amount of tuition assistance paid in the calendar year exceeds \$5,250. Please consult with your tax advisor for additional information.

D. Work Commitment Guidelines

1. A team member who voluntarily terminates employment or is terminated for cause within one (1) year of receiving education assistance will be required to refund Advocate Aurora 100% of the payments received within that time period.

2. If a team member terminates without fulfilling the one-year obligation and does not refund Advocate Aurora 100% they will not be re-hirable until they do so.

3. Team members are exempt from the work commitment if their employment is involuntarily terminated for reasons other than cause or performance.

VI. CROSS REFERENCES

Not applicable.

VII. RESOURCES AND REFERENCES

For additional information, please log-in to the Bright Horizons/EdAssist website by following the respective links: [Wisconsin team members](#) or [Illinois team members](#); you may also reach them by phone 885-853-4980. A list of our preferred partners and other colleges and universities that offer discounts to our team members can be found on the EdAssist website by following the above links.

VIII. APPENDICES

Not applicable.