

EDUCATIONAL ASSISTANCE PLAN BENEFIT (HR-6.04)	
Summary	<p>Carolinas HealthCare System encourages team members to continue their formal education. Team members are encouraged to grow professionally in their careers. Through Carolinas HealthCare System Total Rewards, team members have the opportunity to continue their formal education. This benefit may be used for job-related education (for any Carolinas HealthCare System job). This could include development for a specific skill, preparing for or maintaining a license or certification, or taking educational classes. This benefit meets Internal Revenue Service (IRS) rules. This allows team members to use this benefit without the worry of paying state income, federal income, and FICA taxes (for North and South Carolina). The educational assistance plan benefit is offered in addition to departmental continuing education funds.</p>
Applies to:	<ul style="list-style-type: none"> ➤ Select Carolinas HealthCare System team members with standard hours of 40 or more per pay period and who have completed the 90-day orientation period. New team members in the 90-day orientation period are encouraged to apply so they may start using the educational assistance plan benefit right away.
Definitions	<ul style="list-style-type: none"> ➤ Benefit Schedule ➤ Critical Need Education
Procedures	<ul style="list-style-type: none"> ➤ General Guidelines <ul style="list-style-type: none"> • About the Policy Description • About the Educational Assistance Plan Benefit • Benefit Schedule ➤ Team Member Responsibilities
Related Policies	
Related Links	<ul style="list-style-type: none"> ➤ Educational Assistance Plan Benefit Form ➤ Educational Assistance Plan Benefit FAQs ➤ Educational Assistance Plan Benefit Help Document ➤ Tuition Reimbursement Non-Covered Fees

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Definitions

➤ **Benefit Schedule**

The benefit schedule outlines courses for which the team member may receive educational assistance benefits upon completion. It also outlines the amount of money that will be offered to the team member for each course of study.

➤ **Critical Need Education**

Carolinas HealthCare System defines critical need education. To be deemed critical need education, the course of study must meet two requirements: (1) it develops skills critical to Carolinas HealthCare System business, and (2) these skills are in or may be in short supply in the near future. What is defined as critical need education may change based on the job market supply and demand. Critical need education lists may be found on the [Educational Assistance – Critical Need Education](#) document.

General Guidelines

About the Policy Description

- This policy summarizes the educational assistance plan benefit. The IRS requires a formal document containing the details of the educational assistance plan benefit. Please refer to the formal document for further and more detailed information about what is covered by the educational assistance plan benefit. If there is a difference between this policy and the formal benefit plan document, the latter will control.

About the Educational Assistance Plan Benefit

- Some team members are provided alternative education benefits and are not eligible for assistance. Examples are Physicians, Nurse Practitioners, Physician Assistants and Certified Registered Nurse Anesthetists.
- Team members are encouraged to use the educational assistance plan benefit. It is offered when a course or seminar improves or develops a team member's specific skills in his/her current job or another job within Carolinas HealthCare System. Because this benefit is offered to meet Carolinas HealthCare System needs, Carolinas HealthCare System will decide whether the course/seminar meets this requirement. The areas of covered activities include:
 - Developing job skills or competencies
 - Preparing for the general education diploma (GED)
 - Preparing for, or to maintain, a license or certification
 - Degree programs
- Team members may enjoy, through this benefit, some paid expenses related to taking a course. This may include tuition, required text books, course registration, and lab fees.



- Team members will not be reimbursed for certain expenses. This may include any tools, supplies, equipment that may be kept after course completion (except textbooks), meals, lodging, transportation, courses involving sports, games, or hobbies (unless this education is part of a degree program), license renewal, testing fees, membership, and similar fees. A detailed list can be found on the [Tuition Reimbursement Non-Covered Fees](#) document.
- Carolinas HealthCare System offers this benefit in partnership with team members giving their fullest efforts in a course or seminar. Graded courses must receive a grade of “C” or higher for undergraduate and an “A” or “B” for graduate in order for the team member to receive the benefit. All other courses must be completed with a “pass” if applicable.
- The educational assistance plan benefit offered differs based on a team member’s length of service (hire date) with Carolinas HealthCare System. See chart below for detailed allotments for eligible team members to use within a calendar year:

Length of Service at Carolinas HealthCare System	Full-Time (72-80 hours or more per pay period)	Part-Time (60-71 hours per pay period)	Part-Time (40 -59 hours per pay period)
Less than 3 years	\$1,000.00	\$800.00	\$600.00
	\$2,000.00 (critical need)	\$1,600.00 (critical need)	\$1,200.00 (critical need)
3 years or more	\$1,500.00	\$1,100.00	\$900.00
	\$3,000.00 (critical need)	\$2,200.00 (critical need)	\$1,800.00 (critical need)

- The educational assistance plan benefit will be paid to the team member through direct deposit. Please allow at least four (4-6) weeks from the date submitted to receive benefit.

Benefits Schedule

- The educational assistance benefit offered to team members differs based on the type of course/seminar one completes. The benefit offered is as follows:

Type of Education Course	Percent of eligible costs covered up to limit of benefit
Developing job skills or competency	100%
Preparation for the general education diploma (GED)	100%
Preparing for or to maintain a license or certification	100%
Degree Courses	80%

- The education assistance benefit is designed for current eligible team members and specific education. Therefore, it cannot be used for courses/seminars that a team member started prior to being employed by Carolinas HealthCare System. Likewise, this benefit is not available if a team member ends their employment relationship with Carolinas HealthCare System before their request for reimbursement is approved.



- A team member must be eligible at the start of the course, throughout the course, at the end of the course, and at the time the request for reimbursement is approved (up to four weeks after submission) to receive this benefit. If a team member changes standard work hours between the start of the course and the end of the course, it may affect eligibility for this benefit.
- The education assistance benefit is designed to assist team members with the costs of specific education. For this reason, team members may not receive benefit money for any course/seminar not paid in full by the team member. Examples would be courses/seminars for which the team member had costs covered in part by scholarship, fellowship, or similar grant.
- Organizational Development is responsible for approving or denying team member requests for the educational assistance benefit. If a team member's request is denied, a reason for the denial is provided.

Team Member Responsibilities

- Team members do not need unit or department leader approval. However, it is important that Carolinas HealthCare System is able to properly staff units and departments to forward our mission of patient care. Team members are to discuss with their unit or department leader their request before turning in the application if time away from work will be needed to attend the course/seminar.
- Team members are encouraged to use the educational assistance benefit. The benefit should be applied for at least ten (10) calendar days before the course/seminar is to begin. Team members are to complete an online [Educational Assistance Benefit Form](#) that can be found on PeopleConnect > Human Resources > Careers and Development > Career Development > Educational Assistance Programs. Team members will receive an automatic response that the form was received through email. The team member is to keep this notice as confirmation of receipt. Team members will receive a preliminary approval or denial within seven (7) calendar days of applying. This will be sent through email. The team member's unit or department leader will also receive an email if the team member is approved.
- Carolinas HealthCare System offers this benefit in partnership with team members giving their fullest efforts in a course or seminar. This benefit will not be paid before course completion and/or meeting the grade requirement. The original course approval is to match the documentation submitted showing completion. Upon completing an approved course/seminar, please submit an [Educational Assistance Plan Benefit Reimbursement Request Form](#). This is to be done within 60 days of course completion. Along with the form, please present:
 - Itemized receipts of your paid expenses. (Actual receipts are necessary. Unfortunately credit card bills, internet screen printout not containing your specific name and course, bank account statements, or copies of personal checks cannot be substituted for the actual receipt.)
 - A report card, certificate of completion, or letter of attendance.
- The educational assistance benefit is offered to provide a broad number of opportunities for growth to team members. If a team member has further questions about the plan or would like help in how to use it, please contact the Plan Administrator at edassist@carolinashealthcare.org.

