

# Educational Assistance Plan

## Leader Guide

Atrium Health Floyd's ***Educational Assistance Plan*** is designed to attract, retain, and encourage teammates by providing opportunities to advance their education and for professional development. Enrollment is voluntary, and use of education assistance does not obligate Atrium Health to promote, reassign or reward the participant. Atrium Health Floyd's annual budget for Educational Assistance programs may limit the number of participants from year to year.

Atrium Health has partnered with Bright Horizons to administer Atrium Health Floyd's ***Educational Assistance Plan***. Teammates **must** complete the Atrium Health Floyd (AHF) ***Educational Assistance Plan Application*** and be accepted into the Plan **prior** to any submissions to Bright Horizons. The ***Plan Application*** requires the applicant to obtain approval from their Department Director, along with the Department VP.

Below you will find important highlights of our ***Educational Assistance Plan*** to assist you in conversations with your teammates. The appendix to this guide includes definitions and exhibits that help explain the Plan and each Program.

### WHO IS ELIGIBLE TO APPLY

- Actively employed full and part-time teammates with at least 3 months of consecutive service
- PRN Teammates are only eligible to apply for the Continuing Education Program
- Some teammates are **not** eligible for Education Assistance, including Medical Residents, Physicians, Nurse Practitioners, Physician Assistants, and Certified Registered Nurse Anesthetists

### Eligibility Highlights

- Teammates must be in good standing with no pending disciplinary action or needs improvement areas
- Education must be through accredited programs relating to the teammate's current position or a future position
- Degree and Academic Credit courses must be from a regionally accredited institution
- This benefit is offered in partnership with participants giving their fullest efforts in a course and there are minimum grade requirements to be eligible for reimbursement
- After the most recent reimbursement or payout there is a one-year work commitment
- Participation in the Plan must not interfere with performance of the teammate's job duties; course attendance should be on the teammate's own time and not during regularly scheduled work hours; approval does not relieve a teammate from regular, on-call, emergency, or other duties
- Refer to the [Educational Assistance Policy](#) for other important details

### TEAMMATE APPLICATION PROCESS

AHF teammates must first apply and be accepted into the ***Educational Assistance Plan*** by following these steps:

1. Teammate completes ***Educational Assistance Plan Application*** located on Atrium Health Floyd's [PeopleConnect Teammate](#) site
2. Teammate submits their **complete** application including their personal statement detailing the mutual benefit of the continued education to their Department Director
3. Director reviews application and with department VP's support, either approves or denies participation (completes Director's portion of application and returns it to teammate)
  - Director approval or denial basis should include the teammate being in good standing and the education aligning with the teammate's organizational development plans
  - Director approval does not guarantee Plan acceptance or payments
4. Teammate submits **complete** application to [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org)
  - Incomplete applications will not be processed and will be returned to applicant
  - Some applications may require Executive Team approval
  - Interviews may be scheduled as necessary
5. Applicant will receive an email from [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org) with their Plan acceptance status within 7-10 business days from receipt
6. Once accepted into the Plan, participants follow instructions provided in the confirmation email from [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org) to submit ongoing ***Program Course Approval Applications*** and reimbursement documents directly to EdAssist
  - Participants must submit ***Program Course Approval Applications*** to EdAssist prior to the start of each academic term and applications will not be accepted more than 30 days after the course starts

## PLAN HIGHLIGHTS FOR LEADERS

As a leader determining if an application is approved, priority should be given to teammates seeking assistance in careers where AHF has the greatest operational needs. The teammate should be in good standing with no documented performance issues or needs improvement areas and the education must relate to the teammate's job duties or the duties of a position into which they may progress and should coincide with the teammate's development plans.

**Directors must consult their departmental VP to obtain support in approving or denying *Plan Applications*. Decisions should be based on equity and inclusion with fair and consistent practices and must not be based on a teammate's protected class status.**

HR owns Educational Assistance Plan expenses and has an annual budget for the Plan.

- Departments can expense seminars, conferences, workshops, etc.
- Departments will own any eligible travel expenses for continuing education that is through the Plan
  - The travel expense reimbursement policy must be followed for travel expenses

When determining if a seminar, workshop, conference, etc. should go through the Educational Assistance Plan or be expensed through your department, consider the following:

- Consider if participation in the course is teammate or leader driven
- Consider your departmental budget and operational needs
- Consider the steps involved in being approved for Educational Assistance vs. expensing

## PARTICIPANT RESPONSIBILITIES

Participants should read and understand the [Atrium Health Floyd Educational Assistance Plan Policy](#).

- Participants must meet the eligibility criteria at the time of each ***Program Course Approval Application*** and payment request submission. If a participant changes standard work hours between the start of the course and the end of the course, it may affect eligibility for this benefit.
- To be eligible to receive education assistance, participants must submit a ***Program Course Approval Application*** for each quarter, semester, or academic term to Bright Horizons on the EdAssist portal. Applications should be submitted prior to the course start date and will not be accepted more than **30 days** after the course start date.
- Participants must submit supporting documentation to Bright Horizons on the EdAssist portal at the end of the term, regardless of the grade received, in order to close out the application. Participants will be unable to submit a new ***Program Course Approval Application*** until any open applications are closed out.
- Participants on leave may not submit new applications until returning to active status. Previously approved applications will be eligible for payment during leave.

## Work Commitment

This benefit is not available if a participant ends their employment with Atrium Health before their course ends or before their request for reimbursement is approved for payment. As a condition for payment under this Plan, the participant agrees to remain employed by Atrium Health for a minimum of **1 year** (12 continuous months) after any payout.

A participant who voluntarily ends their employment or employment ends for cause within 1 year of receiving education assistance will be required to reimburse a prorated amount of the payments received. Participants are exempt from the work commitment if their employment involuntarily ends for reasons other than cause or performance. The prorated amount will be calculated by number of months remaining to fulfill the one-year work commitment.

## How Do Participants Get Reimbursed?

Upon ***Program Course Approval Application***, participants make all required payments directly to their school and will be reimbursed for eligible expenses upon successful course completion. They must submit grades and an itemized invoice of tuition and fees (proof of payment) within **60 days** after course completion in order to receive reimbursement. Payment is via a check mailed to their home address or Zelle direct deposit within 1-2 weeks from payment processing.

### What Expenses and Fees Are Covered?

Tuition and eligible expenses will be paid at 100% up to the annual benefit amount. Eligible expenses include:

- Tuition
- Books, including shipping and taxes
- Registration fees
- Lab and technology fee
- Graduation fee

Participants are responsible for all ineligible expenses including, but not limited to:

- Meals
- Lodging
- Transportation
- Tools, materials, or supplies (other than textbooks) that can be kept after completing the course of instruction

### What Degrees or Education Programs Are Eligible?

All education programs must be related to the participant's current job or their established career path within Atrium Health. All coursework must result in academic credit. Educational programs that are covered include:

- Master's Degree
- Doctorate Degree
- Bachelor's Degree
- Associate Degree
- Certificate or Certification (*must have measurable course completion requirement beyond attendance/participation*)
- Individual Courses
- Continuing Education

Education programs that are not covered include, but are not limited to:

- Individual courses for sports, recreation, or hobbies, unless part of a degree program

### Additional Questions?

**Teammates** who are not participants should refer to the Educational Assistance Policy, Plan Guide, or email [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org) with questions.

**Participants** may contact the Bright Horizons EdAssist Support team at 833-211-2710 or receive real-time answers via Live Chat on the EdAssist portal.

**Leaders** with questions about the Plan and Programs may contact [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org).

## Leader Guide Appendix

**DEFINITIONS** The exhibits and definitions below help explain the **Educational Assistance Plan** and each Program.

**Educational Assistance Plan** is the umbrella benefit under which each **Educational Assistance Program** falls. A **Plan Application** is required to be accepted into the **Educational Assistance Plan**.

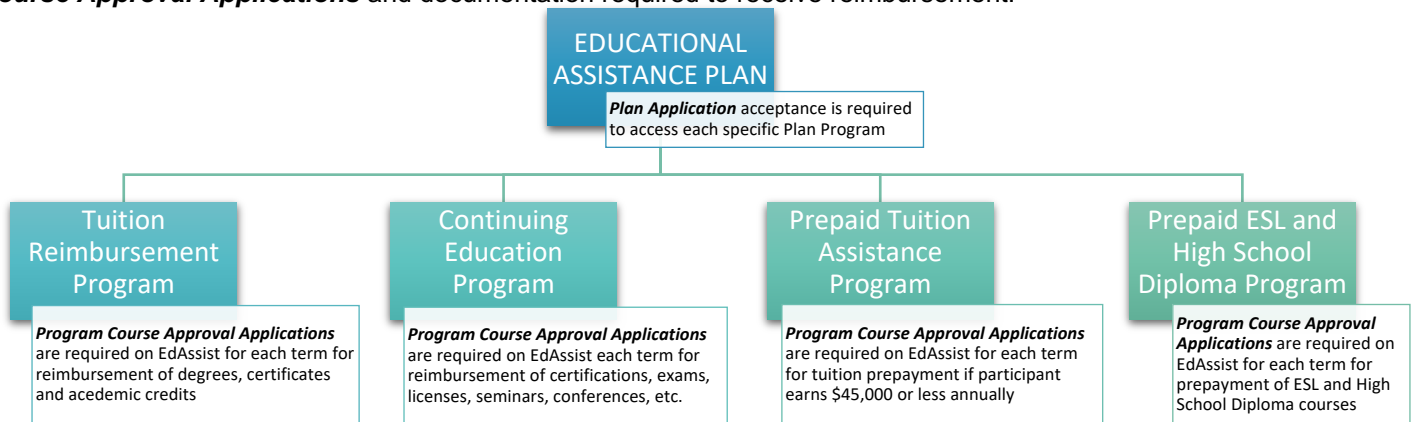
**Plan Application** is the initial application a teammate completes that includes their Director's and VP's support and is submitted to [tuitionreimbursementfloyd@atriumhealth.org](mailto:tuitionreimbursementfloyd@atriumhealth.org) by the teammate. Specific to AHF, these applications must be completed first and teammates must be accepted into **Educational Assistance Plan** prior to any submissions to Bright Horizons on the EdAssist portal. Only one **Plan Application** is required for an entire Program or course of study. If a participant pursues any other or additional course of study, a new **Plan Application** detailing that program is required.

**Educational Assistance Programs** are under the overall **Educational Assistance Plan** and each Program has a specific type of education that is pursued. **Course Approval Applications** are submitted to EdAssist each Program term.

**Program Course Approval Applications** are submitted to Bright Horizons on the EdAssist portal once a participant has been accepted into the **Educational Assistance Plan** (by submitting the **Plan Application**). These applications are more of a verification and used to validate a participant's current eligibility for the Program each academic term. Participants must submit a **Program Course Approval Application** to EdAssist prior to the start date of each quarter, semester or academic term and at the end of the term, participants must add their grades and eligible expenses to this application and close it out.

**Bright Horizons** is Atrium Health's partner that provides the EdAssist portal that participants utilize once accepted into the Plan to submit ongoing **Program Course Approval Applications** and documentation required to receive reimbursement. Bright Horizons can provide teammates with a customized education plan and tips on how to pay for education with a Bright Horizons Coach. Teammates may schedule an appointment with a coach within the EdAssist Portal.

**EdAssist** is the automated online portal under Bright Horizons where approved participants submit ongoing **Program Course Approval Applications** and documentation required to receive reimbursement.



### Tuition Reimbursement for Degrees and Academic Credit

- Full and part-time eligible
- Education results in Associate, Bachelor's, Master's
- Education results in Certificate (technical programs)

Type	Maximum Reimbursement
Certificate & Individual Courses	\$1,500 per year
Degree Programs	\$3,000 per year

### Assistance for Continuing Education

- Full-time, part-time and PRN are eligible
- Includes:
  - Courses and exams required to achieve an approved Certification/Designation
  - Courses, conferences, seminars, workshops, and subscriptions
  - Certifications or recertifications, license or license renewals, and memberships that award Continuing Education Units (CEUs)

Type	Maximum Reimbursement
CEUs & Certifications	\$1,500 per year

### Prepaid Tuition Assistance

- Full and part-time teammates earning \$45,000 or less annually are eligible
- Atrium Health will pay the school directly on their behalf
- Same Education requirement as Degrees and Academic Credit

Type	Maximum Reimbursement
Prepaid Tuition Assistance	\$3,000 per year

### Prepaid ESL and High School Diploma Program

- Full and part-time are eligible

Type	Maximum Reimbursement
ESL & High School Diploma	\$3,000 per year