



EDUCATIONAL ASSISTANCE PLAN

Summary

Atrium Health Floyd encourages teammates to continue their formal education and grow professionally in their careers. Through Atrium Health Total Rewards, teammates have the opportunity to continue their formal education and this benefit may be used for job-related education for any Atrium Health job. This includes development for a specific skill, preparing for or maintaining a license or certification, or taking educational classes.

Educational assistance is offered in accordance with applicable federal income tax law. This benefit meets Internal Revenue Service (IRS) rules, and the Educational Assistance Plan is offered in addition to departmental continuing education funds. Taxation of employer provided tuition assistance is governed by Internal Revenue Code Section 127, for each teammate per calendar year. Taxability for a given calendar year is based on payment date. When applicable, taxes will be withheld in accordance with current tax guidelines. Please consult with your tax advisor for additional information.

This policy describes eligibility and Plan acceptance, the amount of assistance available, and payback responsibility should a participant leave after receiving funds. Atrium Health Floyd’s annual budget for Educational Assistance Programs may limit the number of participants from year to year.

Applies to

Active full-time and part-time Atrium Health Floyd teammates with at least 3 months of continuous service.

Definitions

This policy defines 4 separate Educational Assistance Programs:

1. **Tuition Reimbursement for Degrees and Academic Credit**
2. **Education Assistance for Continuing Education**
3. **Prepaid Tuition Assistance**
4. **Prepaid ESL and High School Diploma Program**

Procedures

Overall Plan Purpose
 Eligibility Requirements
 Conditions for Approval and Payment
 Program Specific Guidelines
 Coverage and Benefit Amounts

EDUCATIONAL ASSISTANCE PLAN

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.

Eligible Atrium Health Floyd 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 to teammate)
 - Director approval or denial basis should include the teammate being in good standing and the education aligning with the teammate's organizational and development plans
 - Director approval does not guarantee Plan acceptance or payments
4. Teammate submits **complete** application with all required supporting documentation to 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 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 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 quarter, semester or academic term and applications will not be accepted more than 30 days after the course start date

Priority is given to teammates seeking assistance in careers where Atrium Health Floyd has the greatest operational needs. 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.

Approval should be granted for the entire course of study prior to the teammate's registration or enrollment in the course. Applications will be reviewed for policy compliance by the Program Administrator, who has complete discretion to interpret the Plan and to approve or deny applications for eligibility and reimbursement.

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.

The Plan is designed for current eligible teammates and specific education. It is not designed for courses that a teammate started prior to being employed by Atrium Health.

Some teammates including Physicians, Advanced Practice Providers, Nurse Practitioners, Physician Assistants and Certified Registered Nurse Anesthetists are not eligible for assistance under this Plan.

MINIMUM PLAN ELIGIBILITY REQUIREMENTS

- Actively employed with at least 3 months of consecutive service
- In good standing with no pending disciplinary action or needs improvement areas
- Full-time teammate scheduled a minimum of 30 hours per week
- Part-time teammate scheduled at least 20 hours per week
- PRN eligibility is Program specific
- Continuing education is through accredited programs relating to the teammate's current position or a future position in their organizational development plans

CONDITIONS FOR PROGRAM APPROVAL AND PAYMENT

Once accepted into the ***Educational Assistance Plan***, the following applies to all Programs:

- Eligibility criteria must be met at the time of application submission and payment processing
- If a participant changes status between the start of the course and the end of the course, it may affect eligibility for reimbursement
- Eligible expenses include tuition, course related fees, exams and required textbooks
- Covered Expenses do not include parking, student activity, and other non-academic fees and **any payment request including these types of fees will be automatically denied**
- Travel, meals, lodging, transportation, tools, hardware, or supplies (other than textbooks) and other expenses relative to class work are not eligible for reimbursement
- Eligible expenses will be covered up to the Program's annual benefit amount for the calendar year in which the course ends
- The annual limit is enforced each "Plan Year," defined as January 1 through December 31
- Upon EdAssist ***Program Course Application Approval*** of non-pre-paid Programs, the participant is responsible to make all required payments directly to their education provider and will be reimbursed for eligible expenses upon successful course completion
- The participant is responsible for submitting proof of successful course completion (grades or CEUs awarded) and an itemized invoice of tuition, fees, or course costs with proof of payment within 60 days after course completion to receive reimbursement. Participants must submit supporting documentation to EdAssist regardless of the grade received to close out the application
- This benefit is offered in partnership with participants giving their fullest efforts in a course:
 - A grade of "C" or higher (C- is eligible) is required for undergraduate course payments
 - An "A" or "B" (B- is eligible) is required for graduate course payments
 - All other courses must be completed with a minimum 3.0 GPA or "pass," as applicable

WORK COMMITMENT

This benefit is not available if a teammate 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 teammate 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. Teammates 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.

TAX IMPLICATIONS

In compliance with IRS regulations (section 127), employer provided education assistance is exempt from taxation up to the maximum limit per calendar year. Taxes will be assessed if, at the time of payment processing, the total amount of tuition assistance paid in the calendar year exceeds the maximum limit. Please consult with your tax advisor for additional information.

OTHER SOURCES OF FINANCIAL ASSISTANCE

Teammates receiving education grants, scholarships, military benefits or discounts must disclose all such financial assistance and provide documentation of how the funds were applied. 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. Financial Aid received in the form of student loans will not be deducted.

ACADEMIC ADVISING

EdAssist offers Academic and College Finance Advisors who are available to discuss Program and school considerations and assist with finding career relevant educational options. Teammates are strongly encouraged to reach out to an EdAssist Academic Advisor who will work directly with teammates to create a customized education plan that offers a direct, convenient, and cost-efficient route to earning a degree and meeting the teammate's education goals.

Teammates are encouraged to verify an educational institution's accreditation by speaking with an EdAssist Advisor or through the Council on Higher Education Accreditation (www.chea.org) or the US Department of Education (<https://ope.ed.gov/accreditation>).

To schedule an advising appointment, call 833-211-2710 Monday through Friday, 8am-8pm, or use the self-scheduler option available under "education Coaching" on the EdAssist website.

1. Tuition Reimbursement for Degrees and Academic Credit Program

PROGRAM PURPOSE

The Tuition Reimbursement for Degrees and Academic Credit Program provides financial assistance to eligible teammates for continuing education through **accredited degree programs**.

Education programs ***not*** covered in this portion of the policy include, but are not limited to:

- Certification, designation, and license exams
- Continuing Education Units
- Seminars, conferences, and workshops
- Private tutoring or audited courses

PROGRAM SPECIFIC ELIGIBILITY

Active full and part-time teammates are eligible for this Program. PRN teammates are ***not eligible***.

- All clinical and non-clinical programs must result in the award of an Associate's, Bachelor's, Master's, Doctoral, or JD degree by an institution holding ***regional accreditation***
- Certificate programs include a bundled number of courses that result in a certificate of completion and demonstration of mastery in a particular area (can be both academic and professional) and must be obtained from a ***regionally accredited institution***
- This program may be used concurrently with the Educational Assistance Program for Continuing Education by teammates who are eligible for both programs

COVERAGE AND BENEFIT AMOUNTS

Participants may receive up to \$3,000 in reimbursement per calendar year for Covered Expenses.

- Eligible expenses include tuition, course related fees, exams and required textbooks
- Covered Expenses **do not include** non-academic fees and **any payment request including these types of fees will be automatically denied**

Program Type	Maximum Reimbursement
Certificate Program and Individual Courses	\$1,500 per year
Degree Programs <i>Clinical & Non-Clinical</i> Associate, Bachelor's, Master's	\$3,000 per year



2. Educational Assistance for Continuing Education Program

PROGRAM PURPOSE

Education covered by this portion of the Plan may include:

- 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)

Educational activities not covered in this portion of the policy include, but are not limited to:

- Degree programs
- Private tutoring

PROGRAM SPECIFIC ELIGIBILITY

Active full-time, part-time and PRN teammates are eligible to participate in this Program.

- Certifications/Designations must be provided by a professional association, certifying body or institution authorized to award the industry accepted certification/designation

COVERAGE AND BENEFIT AMOUNTS

Participants may receive up to \$1,500 in reimbursement per calendar year for Covered Expenses.

- Eligible expenses include the course, seminar, conference, workshop, certification, recertification or membership cost and any lab or tech fees required to complete the course
- Expenses for test preparation courses, exams and recertification are eligible for reimbursement
- Covered Expenses do not include non-academic fees related to enrollment and ineligible fees will be deducted from application prior to payment processing
- Meals, lodging, transportation and tools, software, hardware, or supplies (other than textbooks) that can be kept after completing the course of instruction are ineligible

Education Type	Maximum Reimbursement
Continuing Education Units & Certifications	\$1,500 per year

CONDITIONS FOR APPROVAL AND PAYMENT

All submitted reimbursements must be accompanied by proof of successful completion that is directly associated with the activity. Standalone fees are not reimbursable and ineligible fees will be deducted prior to payment processing.

- Proof of CEUs earned is required for reimbursement of courses, membership, conference, seminar, or workshop fees
- Certifications/Designation exams must be passed at a level eligible to earn the industry accepted certification/designation
- For memberships and subscriptions, participants must provide proof of successful course completion that is directly associated with the cost of membership; the membership fee will only be reimbursed once per membership term and cannot be requested more than once in a calendar year and costs associated with additional courses after membership costs are eligible for reimbursement

3. Prepaid Tuition Assistance

PROGRAM PURPOSE

The Prepaid Tuition Assistance Program provides financial assistance to eligible teammates for continuing education through accredited degree programs.

Education programs not covered in this portion of the Plan include, but are not limited to:

- Certification, designation, and license exams
- Continuing Education Units, seminars, conferences, and workshops
- Private tutoring or audited courses

PROGRAM SPECIFIC ELIGIBILITY

Active full and part-time teammates earning \$45,000 or less annually are eligible for this Program. PRN teammates are not eligible. Eligible teammates will not have any out-of-pocket costs, as Atrium Health will pay the school directly on their behalf.

- All clinical and non-clinical programs must result in the award of an Associate's, Bachelor's, Master's, Doctoral, or JD degree by an institution holding **regional accreditation**
- Certificate programs include a bundled number of courses that result in a certificate of completion and demonstration of mastery in a particular area (can be both academic and professional) and must be obtained from a **regionally accredited institution**
- This program may be used concurrently with the Educational Assistance Program for Continuing Education by teammates who are eligible for both programs

COVERAGE AND BENEFIT AMOUNTS

Participants may receive up to \$3,000 in reimbursement per calendar year for Covered Expenses.

- Eligible expenses include tuition, course related fees, exams and required textbooks

Program Type	Maximum Reimbursement
Prepaid Tuition Assistance: <i>Clinical & Non-Clinical Degrees, Certificates, Individual Courses</i>	\$3,000 per year

Payment Process

Upon application approval, the participant will receive a Letter of Credit to present to their school **each semester** at the time of registration. The school will submit an itemized invoice to EdAssist. EdAssist will process payment to the educational provider for eligible expenses on behalf of Atrium Health.

The participant is responsible for submitting proof of successful course completion (grades) within 60 days after course completion to close out the application. All courses must be completed with a passing grade. Courses that are not completed successfully must be retaken at the participant's expense. Participants must submit supporting documentation regardless of the grade received to close out the application. Failure to upload documentation within the 60-day timeframe will result in the participant's account being suspended until the documentation is received. Once documentation is received, the participant will be able to continue with submitting new applications. Upon application approval, a participant may create an application for reimbursement of book expenses. Book charges may be immediately reimbursed; book receipts are due no later than 60 days after the course end date.



4. Prepaid ESL and High School Diploma Program

PROGRAM PURPOSE

The following providers are eligible within this Program:

- ESL: EnGen
- High School Diploma: Career Online High School

Education programs not covered in this portion of the policy include, but are not limited to:

- Degrees, certificates, or individual courses not related to ESL or a High School Diploma
- Programs not offered by the select providers chosen for this program
- Certification, designation, license exams, Continuing Education Units
- Seminars, conferences, and workshops
- Private tutoring or audited courses

PROGRAM SPECIFIC ELIGIBILITY

Active full and part-time teammates are eligible to participate in this Program. PRN teammates are not eligible. Eligible teammates will not have any out-of-pocket costs, as Atrium Health Floyd will pay the school directly on their behalf.

- This Program may be used concurrently with the Educational Assistance Program for Continuing Education by teammates who are eligible for both programs

COVERAGE AND BENEFIT AMOUNTS

Participants may receive up to \$3,000 in reimbursement per calendar year for Covered Expenses.

- Eligible expenses include tuition, all invoiced fees, exams and required textbooks

Program Type	Maximum Reimbursement
<p>Prepaid ESL & High School Diploma Program: <i>Includes subscription fee at select providers for unlimited courses towards ESL certificate or High School Diploma</i></p>	<p>\$3,000 per year</p>

Payment Process

Upon application approval, Career Online High School participants will receive an authorization code for registration. Voxy EnGen (ESL) program participants do not need an authorization code to register upon application approval. The schools will submit itemized invoices to EdAssist. EdAssist will process payment to the educational provider for eligible tuition charges on behalf of Atrium Health.

The participant is responsible for submitting proof of successful course completion (grades, certificate, or diploma) within 60 days after course completion to close out the application. All courses must be completed with a passing grade. Courses that are not completed successfully must be retaken at the participant's expense. Participants must submit supporting documentation, regardless of grade received, to close out the application. Failure to upload documentation within the 60-day timeframe will result in the participant's account being suspended until the documentation is received. Once documentation is received, the participant will be able to continue with submitting new applications.