



Section: 300 - Personnel

Subject: Tuition Reimbursement

## I. Purpose

It is the policy of Jackson Health System (JHS) to encourage all employees to improve their effectiveness in their job performance and to prepare themselves for future career opportunities with the JHS. Therefore, eligible full-time and part-time employees may receive reimbursement toward tuition at an accredited educational institution or certification reward program according to the conditions established in this policy.

The tuition reimbursement program and budget are reviewed annually and are subject to change based on financial reasons and/or when in the best interest of Jackson Health System.

## II. Procedure

### A. Eligibility

1. The following eligibility criteria apply to employees who wish to participate in the program:
  - a. Unless on an approved Leave of Absence, employees must be in pay status at the time of application submission for tuition reimbursement.
    - i. Reimbursement will only be processed for those who remain eligible at the time of course completion.
  - b. Employee's most recent performance evaluation must reflect a "meets standards" or higher overall evaluation rating.
    - i. It is the responsibility of department's Management Leadership Team (MLT) member to review this evaluation prior to approving any tuition reimbursement application.
  - c. All supervisory approval must be obtained by department Management Leadership Team (MLT) member.
  - d. Full-time employees and employees in grant funded positions must have a minimum of six (6) months continuous employment to be eligible for participation.
  - e. Regular part-time employees must have completed 1040 hours of employment and receiving benefits to be eligible for \$2,500 per fiscal year.
2. As part of our commitment to employee development, Jackson Health System may facilitate on campus cohorts from strategically selected academic institutions.
  - a. Employees must be nominated and approved in order to take part in these programs and may use tuition reimbursement funds to cover tuition costs.

### B. Standard Tuition Reimbursement

1. Employees will be reimbursed for individual courses that develop new skills or advance knowledge in a job-related area, or courses need to complete an Associate's Degree, Bachelor's Degree, Master's Degree, MBA or Doctorate Degree.
  - a. Employees must successfully complete courses to qualify for tuition reimbursement.
  - b. Successful completion is defined as receiving a minimum grade of "C" in undergraduate and "B" in graduate courses or pass on courses graded on a pass/fail system.
  - c. Successful completion of other programs, such as certificates or NCLEX exams or any other approved program is required in order to receive tuition reimbursement.
2. Reimbursement Limits
  - a. Reimbursement for approved expenses for full-time employees is limited to actual cost up to \$5,000 (\$2,500 for regular part-time employees) per Jackson Health System fiscal year.



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- i. Reimbursement is subject to the following provisions
    - (1) Note:
      - (a) Jackson Health System fiscal year begins October 1st and ends September 30th.
      - (b) All reimbursement is determined by the course end date.
    - b. Employment Obligations
      - i. All employees receiving reimbursement under this program are obligated to remain in the active employment of Jackson Health System for a period of one (1) year from the completion date of class or to repay Jackson Health System as described in the tuition reimbursement agreement that is to be signed by each applicant.
- C. Discounts, State Subsidies, and Grants
1. Employees are required to take advantage of any discounts or other subsidies that may be available to them which would cover expenses qualifying for tuition reimbursement.
  2. JHS will provide tuition reimbursement only to the extent that expenses are not covered by discounts, subsidies, grants, scholarships, or other services; and any such reimbursement is subject to the provisions in paragraph B.2.
- D. Reimbursable Courses
1. All courses required in pursuit of a degree at an accredited school or courses in an online program which will prepare the employee for a higher position or a change in career field within Jackson Health System.
  2. Individual preparatory or health care related courses from an accredited technical or trade schools leading to certification in a field that will prepare the employee for a higher position or a change in career field within Jackson Health System.
  3. Courses at an accredited university, college, trade, business, or vocational school (not in pursuit of a degree or certificate) that will enhance skills in current classification or prepare the employee for a higher position or change in career field within Jackson Health System.
  4. Prerequisite courses outside the major course of study (e.g., completion of an undergraduate statistics course in order to be allowed to register for the graduate course).
  5. Covered Fees
    - a. All fees associated with individual coursework (for example textbook, lab, technology, registration)
    - b. Certification exam fees (for example: National Council Licensure Examination (NCLEX) exams fees).Recertification or Licensure Fees
  6. Fees for online courses
  7. Contact Hour Courses (formerly referred to as Continuing Education Units (CEU) courses, preferred by Florida State Board of Nursing).
- E. Application
1. All participating employees will log into the online platform and complete an application for tuition reimbursement.
  2. Applications must be received and approved no later than two weeks after the start of the course, certificate program, etc. for which reimbursement is being requested.
  3. Grades, passing scores and/or certificates should be submitted no later than 45 days after completion of the course and must reflect documentation of the institution issuing the grade.
    - a. The acceptance and approval of the documentation is at the sole discretion of the Tuition Reimbursement administrator.




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b. Failure to submit these documents on time will result in forfeiture of tuition reimbursement benefits for the applicable courses.

F. Class Schedule

1. Classes are to be scheduled outside of working hours unless the employee's administrator or director of patient care services approves the use of accumulated annual, personal, or holiday time.

G. Income Tax Deductions

1. Jackson Health System will comply with regulation regarding taxation of tuition reimbursement proceeds, as listed in Section 127 of the IRS Tax Code.

H. Deferred Payment Agreements

1. Jackson Health System does not enter into and/or endorse deferred payment agreements. Employees are solely responsible for deferred payment arrangements with their respective school (s).

### III. References

Section 127 of the IRS Tax Code

**Responsible Party:** Executive Vice President & Chief Human Resources Officer  
JHS

**Reviewing Committee(s):** JHS Policy & Procedure Committee

**Authorization:** President and CEO, Jackson Health System