



Education Benefit Policy

Applies to: Regular full-time and part-time salaried benefitted employees. Temp, wage, and other non-benefitted employees are ineligible for this program.

I. Overview

In order to increase the career opportunities available to employees at the University of Virginia, enhance the performance of staff members and their units, and encourage professional growth, the University offers an Education Benefit that includes two components: Tuition, and Professional Development. These are two separate offerings with different requirements and financial amounts. In addition, departments may choose to offer additional educational benefits through departmental funding.

Education Benefits are paid through direct deposit within two pay periods from the date of approval. Employees are encouraged to submit requests far enough in advance to obtain approval prior to registering for courses.

II. Regulations and Definitions

A. Eligibility

An employee is eligible for Education Benefits if the following conditions apply:

- Currently employed at the University of Virginia in a full-time salaried (30 hours or more) or part-time salaried (20-29 hours) benefitted position.
- Employed at the University of Virginia in a benefitted position for at least one year by the start date of the class, and intends to, and does, remain on the active payroll during the entire term of the class. For purposes of calculating the one year in service, there may not be a break in service. Eligible service time for this benefit does not include employment at previous state agencies. Eligible service time for this benefit does include prior employment at the UVA Medical Center when transferring directly, and if the former position at UVA Medical Center was benefits eligible while working there.
- If attending a conference or event, employee must receive CEU's or certification credits and the conference must be directly related to employee's position.
- Takes the course for credit, CEU's, or certification in the employee's field of study with approval from supervisor as outlined in employee's performance plan.

- Successfully completes the course, defined as receiving a grade of “C” or better, or “passing” when the course was taken pass/fail.
- Provides the required documentation (proof of payment and proof of successful completion) within 30 days after completion of the course.

B. **Qualifying Courses**

To qualify for the Tuition Benefit, the employee must be enrolled in for-credit courses working towards Associate’s, Bachelor’s, Master’s, or Doctoral degree or for-credit Certificate Program. Courses must be taken at nationally recognized (U.S. Department of Education or American Council on Education) accredited colleges, universities or technical schools. In addition, the employee must receive a grade of “C” or better, or “passing” if course was taken pass/fail.

To qualify for the Professional Development Benefit (which includes professional development classes, certification training, or conferences), courses or events must be job related, career growth related, or a developmental opportunity outlined in the employee’s performance plan. Education must be provided or sponsored by a recognized provider of learning experiences which will be determined by central Human Resources.

The education must meet at least one of the following criteria:

- Contributes toward enhanced performance in the employee’s present position by updating and improving knowledge and skills that will enable the employee to more effectively perform his or her current duties and/or support the university mission
- Helps the employee qualify for consideration for a higher level position at the University to which the employee may reasonably aspire and for which there is probable opportunity for advancement
- Taken to complete the requirements for a high school diploma
- Required for job-related professional certification or license
- Enhances the University’s ability to respond to current and future needs
- Supports the documented employee development plan of the employee’s performance evaluation process

Accredited Educational Institutions. Courses must be taken from educational institutions accredited by recognized accrediting agencies and institutions, including those approved under government education and training programs. U.S. Department of Education and American Council on Education Courses will be sources used to verify approval. Visit <http://www.ed.gov/accreditation> for resources about accreditation.

Non-eligible Programs or Expenses. Personal enrichment courses, sports, games, hobbies, workshops, seminars, management development programs, special examinations for admission to degree programs, private consultant refresher courses to take examinations and admission examinations are not eligible for reimbursement. Courses related to mindfulness, yoga and other similar-related courses should be supported through Hoo's Well, or other vendors, and are not part of the Education Benefit program. Books, materials, travel, lodging, and food are not eligible expenses.

C. **Amount of Support**

General Terms. The amount of the benefit is calculated based on registration fees (for conferences) and tuition only. Other fees and expenses are not covered under this program (student activity, technology, etc.). Tuition is calculated using the in-state tuition rate (where applicable), regardless of the residency status of the employee, and is based on the current tuition rate at the time of the request.

Amounts. In 2017, the Tuition Benefit will allow up to \$4,360 toward a degree seeking program. The Professional Development Benefit will allow up to \$2,000 for professional development, including classes, certification training, and conferences. The maximum combined Tuition and Professional Development Benefit is \$4,360 per calendar year. In addition, departments may choose to offer additional educational benefits through departmental funding. With approval, an employee would submit the department funding request and provide both the PTAO of the department and the supervisor's computing ID.

Tax Implications. The Internal Revenue Code (IRC) requires reporting and withholding of income and FICA taxes for Tuition and Professional Development Benefits whenever those payments exceed \$5,250 annually for each employee. Tuition reimbursements, exceeding \$5,250 in 2017, will be considered taxable income and reported to the Internal Revenue Service. Federal, state and FICA taxes will be withheld on any amount in excess of \$5,250.

Potential Taxation of Education Benefit. For tax reporting purposes, Education Benefit funds are reviewed from Oct. 1-Sept. 30 to allow time for payroll to appropriately document them on W-2s. If you receive over the IRS limit of \$5,250 within that time frame, the excess is considered taxable income to you and appropriate taxes will be withheld

D. **Work Schedule Accommodation**

Employees should plan to take courses scheduled at times that will not require absence from work during regular work hours. The employee will need to check with their supervisor (prior to registration) to determine whether the supervisor can approve a work accommodation request.

The decision to grant a work accommodation for the Education Benefit is discretionary with the unit supervisor and is based on the supervisor's assessment of a number of factors, including anticipated needs of the unit, available resources of the unit, and the motivation and potential of the staff member making the request.

In the event attendance at an approved course will necessitate an absence during normal work hours, various accommodations are possible, depending on the needs of the unit and the staff member. Supervisors are encouraged to make a reasonable effort to find an appropriate work schedule accommodation, but it is at the discretion of the supervisor.

The following accommodations are possible:

Revised work schedule. An employee may be granted a revised work schedule to enable him or her to attend a course that could not be scheduled during non-work hours, if the supervisor determines that the staff member will be able to meet all of the job requirements under the revised work schedule.

Excused absence with use of leave time. In some cases, the needs of the unit and/or the staff member may be better served by permitting a staff member who wishes to take advantage of the Tuition and Professional Development Benefit to use leave time. Any such arrangement is made at the discretion of the unit supervisor.

Release time with pay. In some instances, a staff member may be granted up to 3 hours per week of release time from work with pay if it is related to a degree that is job related. Any such arrangement is made at the discretion of the unit supervisor. The 3 hours per week of release time includes travel time to and from class.

E. **Request for Education Benefits**

An employee who wishes to take advantage of the Education Benefit must submit the request through Employee Benefits Self-Service (visit www.hr.virginia.edu and click the Education Benefit Request tab to access). For successful submission, the employee should see a "confirmation" before completed.

F. **Process for Payment**

Upon approval, monies will be deposited through the employee's payroll on the next available pay period. Please allow up to two pay periods to receive payment.

Within 30 days following the end of the course or event, the employee will provide documentation through employee self-service. This will include, 1) an official grade report or appropriate document showing successful completion of the course, and 2) a paid bill or receipt indicating the amount of tuition the employee paid.

In accepting the Education Benefit under this policy, an employee agrees to successfully complete the class and provide an official grade report or appropriate document and a paid bill or receipt for tuition. Failure to complete both steps will result in the full amount of the benefit repayment deduction from the employee's next available paycheck. No additional benefits will be paid until all deductions have been processed.

If an employee leaves the University, either voluntarily or involuntarily, before successfully completing the course or before reimbursing any amounts owing under this policy, or if an employee does not register for, or stops attending, a course for which he or she has received an education benefits disbursement, the employee is responsible for immediate repayment of the full amount of the benefit disbursement.

G. Source of Funds

Providing Central funding for Education Benefits (Tuition and Professional Development) under this program is the responsibility of central Human Resources. Additional departmental funding will be provided by the employee's department.

Education Benefit payments cannot be made as direct charges to sponsored projects. For employees paid from sponsored projects, the employee's unit is responsible for the costs. Work time off to attend classes is permitted on sponsored projects.

Participants who are covered by tuition resulting from service in the Armed Forces, government aid, or other form of scholarship monies are eligible under this program for only that portion of the tuition support to which they would otherwise be eligible, less the amount of the other benefit.

H. Appeals Process

Employees may appeal a decision when their request is denied. The appeal must be submitted within two weeks of the denial. A decision will be provided within two weeks following receipt of appeal.

- Appeals should be submitted by email to AskHR@virginia.edu.
- The subject line should list Tuition/Professional Development Appeal.
- The email must include the following information:
 - An explanation how the requested course or certification applies to current UVA work-related role or duties;
 - A copy of the curriculum and activities for the course or certification that is being requested; and
 - Any additional supporting documentation that further demonstrates how the requested course or certification would directly support responsibilities for UVA work-related duties.

Policy Review Date: January 3, 2017