

FREQUENTLY ASKED QUESTIONS

EDUCATIONAL ASSISTANCE

ELIGIBILITY

WHAT ARE THE ELIGIBILITY CRITERIA FOR THE EDUCATIONAL ASSISTANCE PROGRAM?*

- Must stay for at least 1 year after receiving reimbursement.
- Must be employed with Phoenix Children's for 90 days prior to class start date and submitting an Educational Assistance Request.
- Must be a .5 FTE – 1.0 FTE (Part-time to Full-time).
- Must not be on a final written warning for a minimum of 6 months during submission of the Educational Authorization Request.
- Must fill out the Policy Acknowledgment Form and attach to EACH Educational Authorization Request prior to class starting.
  - Form can be found on PCH4U – Educational Assistance Program page
  - Employees on a fixed term or contract with Phoenix Children's are not eligible for this program.*

FIRST STEP IN DECIDING TO GO BACK TO SCHOOL

It is advised to speak with your manager prior to starting a program about your educational goals in order to ensure the degree program and/or certification you are seeking qualifies under this policy.

*** PLEASE NOTE:** Fellows seeking a Master's degree are eligible for this program.

HOW TO SUBMIT

HOW DO I SUBMIT FOR EDUCATIONAL ASSISTANCE FOR DEGREE PROGRAMS AND CERTIFICATIONS?

1. Download, Print, and fill out the Policy Acknowledgment Form found on PCH4U > Educational Assistance Program page.
2. Log into eRequest.
3. Click **VIEW** next to **MY EMPLOYEE FILE.**
4. Click **CREATE NEW EDUCATIONAL ASSISTANCE REQUEST.**
5. Click **CREATE NEW PREAUTH.**
6. Answer the entire prompted fields.
7. Attach the Acknowledgment Form.
   NOTE: you will need to fill out and sign a new one for each class.
8. Click **SUBMIT REQUEST.**
9. Check the status of the application.*

HOW DO I SUBMIT AN EDUCATIONAL AUTHORIZATION REQUEST FOR MY CERTIFICATION COURSES/EXAM?

If courses are required prior to sitting for the exam, the start date will be the very first class you have to take and the end date will be the date you sit for the exam. You will be reimbursed upon completion and passing of the exam.

DO I ENTER THE TOTAL TUITION AMOUNT OF THE TUITION AMOUNT PER CREDIT?

You are to enter the **TOTAL TUITION AMOUNT** for that class or classes, not the amount per credit hour.

***** Must be in a submitted status.

PROGRAMS

COVERED – Pre-approved undergraduate and graduate coursework leading to degrees related to your job or career at Phoenix Children's, Pre-approved certification coursework required prior to sitting for national certification exams, Pre-approved national certification exams, Prior learning assessments and tests used to document knowledge for the purpose of granting credit, Medical Assistant Program, MRI/CT Program, EMT Program.

NOT COVERED - Certificate granting programs (receives a certificate of completion), Juris Doctorates or Law Degrees, Family Nurse Practitioner Degrees (unless pre-approved by Senior Leadership based on business need. Please reach out to HR to apply for an exception), Continuing education courses for maintaining certification, Test preparation classes.

MAXIMUM BENEFIT AMOUNTS

IS THERE A MAXIMUM FOR EDUCATIONAL ASSISTANCE?

Full-time (.90 FTE – 1.0 FTE): Eligible for $5,250/calendar year

Part-time (.75 FTE - .80 FTE): Eligible for $4,000/calendar year

Part-time (.50 FTE - .74 FTE): Eligible for $3,150/calendar year

DEADLINES FOR SUBMITTING AUTHORIZATION REQUESTS AND REIMBURSEMENT REQUESTS

WHEN DO I HAVE TO SUBMIT AN APPLICATION FOR EDUCATIONAL ASSISTANCE?

You have until the **START DATE** of the class to submit your Educational Authorization Request. You can submit applications up to 90 days in advance of the start date.

HOW MANY DAYS AFTER MY CLASS/CERTIFICATION HAS ENDED CAN I SUBMIT FOR REIMBURSEMENT?

You have 60 days AFTER the class has ended to submit for reimbursement. Anything that is submitted AFTER the 60-day window will NOT be reimbursed.

APPROVAL

DOES MY MANAGER NEED TO APPROVE MY COURSEWORK?

Yes. Once your Educational Assistance Request has been submitted, it will automatically be routed to your manager for approval. After you manager has approved it, it will come to HR for final approval. It will then sit in a COMPLETED status until your class has ended.

EXPENSES & FEES

COVERED - Tuition costs, required books, lab fees (only for science classes and nursing theory courses), credit exams used for granting credit towards an approved degree, along with fees for posting these credits (CLEP, ACE, DANTES/DSST, UExcel, Excelsior, Straighterline and portfolio preparation through Learning Counts or similar PLA providers), required certification course work PRIOR to sitting for the certification exam, National certification exam.

NOT COVERED - Transportation, lodging, parking, meals, supply expenses (equipment, uniforms, software, computer hardware, and lab coats), financial charges, fees, continuing education course for maintain certification and test preparation classes, any certifications/degrees REQUIRED for your current job.

REIMBURSEMENT

HOW DO I REQUEST REIMBURSEMENT FOR A CLASS THAT HAS ENDED?

1. Log into eRequest.
2. Click **VIEW** next to **MY EMPLOYEE FILE.**
3. Click on the Authorization Request for the class that has ended.
4. Click **REIMBURSEMENT** (this opens up the Reimbursement Request).
5. Make any changes to the eRequest (add books, change amount, add scholarships/grants received).
6. Upload all of the required documents.
7. Click **SUBMIT REQUEST.**
8. Check the status of the application.
   *Must be in accepted or approved status.

Items needed for reimbursement: Grades (or passing of certification exam), Book receipts (if requesting book reimbursement), Tuition itemized cost breakdown, Proof of payment (from your university/ school). All of these documents must have your name and your school name on them.

TAXABLE INCOME

WILL MY EDUCATIONAL ASSISTANCE BE TAXED?

Under Section 127 of the Internal Revenue Code, Educational Assistance and/or certification reimbursement in excess of $5250 per calendar year may be taxable. Taxes assessed based on the time of payment processing.

EXAMPLES

Example 1: Typical Educational Assistance Request.
Employee A meets her 2018 untaxed reimbursement limit in September 2018 for classes that have ended in 2018. She has one more class that ends in 2018 but will not be reimbursed for that class because she has met her reimbursement limit for the given year. Her reimbursement limit will reset in January 2019.

Example 2: Detailed explanation of $5,250 untaxed limit process in a calendar year. *Request processed AFTER final PCH paycheck*.
Employee B finishes a semester at ASU in 2018 and submits for $5,250 reimbursement. The submittal takes place AFTER the final PCH paycheck for 2018 is released. He is reimbursed $5,250 (untaxed) in January of 2019. This amount goes towards his 2018 reimbursement limit due to the classes ending in 2018. He is still eligible for $5,250 for courses completed in 2019 but will be taxed on any amount submitted since he received his untaxed limit of $5,250 for 2018 completed courses in January 2019.

Example 3: Part-time example requested processed after missed deadline.
Employee C is a part-time employee who receives $4,000/calendar year in educational reimbursement. Employee C submits for $4,000 for her 2018 fall semester in January 2019 due to missing the deadline for the last paycheck in 2018. She is reimbursed the 2018 courses 2019. Employee C is still eligible for $4,000 for courses taken in 2019. If she receives the entire $4,000 for courses that have ended in 2019, she will be taxed on $2,750 due to going over the IRS untaxable limit of $5250.

SUBMITTAL DEADLINES

In order to avoid Examples 2 and 3 from occurring, any reimbursements for the end of the year MUST be submitted by the beginning of December in order to be processed prior to the last paycheck in that year.

CHECKING APPLICATION STATUS

You can check the status of your applications by going into eRequest, into My Employee File and on the right hand side of all of your applications you will look at the Status column.

STATUS EXPLANATION:

Submitted - eRequest has been sent to your manager for approval

Approved/Accepted - eRequest has been sent to HR for approval

Completed - eRequest has been accepted and approved.

Created - eRequest has been created but not submitted.

No one can see eRequest except for employee.

Changed - eRequest has been altered by employee

and is not yet submitted for approval.

TERMS

EMPLOYMENT – Must be employed with PCH for 90 days.

PAYBACK – If I choose to leave Phoenix Children's before the 1-year requirement, I will have to payback any reimbursement received within the rolling 12 months prior to termination date.*

WRITTEN WARNINGS –If I am on a written warning when I submit my Educational Assistance Request, my manager will deny that class until I am no longer on that warning. If I am placed on a written warning while currently in a class, I will be reimbursed for that class but will be denied if I try to submit another Authorization Request until I am no longer on that warning for a minimum of 6 months.
*Review policy for further explanation

WHAT IF I RECEIVE A GRANT OR OTHER FINANCIAL AID FROM MY SCHOOL OR OTHER SOURCES?

When submitting an Educational Assistance Request AND Educational Reimbursement Request, drop downs will be available for grants or scholarships received. This will automatically deduct the amount of grants/scholarships received from the requested tuition amount.

WHAT IF I CAN'T FIND MY SCHOOL/CERTIFICATION/DEGREE PROGRAM IN EREQUEST?

Contact Human Resources at 602-933-4062 to make sure that the degree program/certification/school is within the PCH network and falls under the Educational Assistance Policy **PRIOR** to applying for said program/school.

WHAT ARE THE ELIGIBLE EDUCATIONAL ASSISTANCE PROVIDERS FOR EDUCATIONAL ASSISTANCE?

Degree courses must be completed at institutions of higher learning accredited by one of the six Regional Accrediting Associations listed below:

- Middle States Association of Schools and Colleges
- New England Association of Schools and Colleges
- North Central Association of Schools and Colleges
- Northwest Association of Schools and Colleges
- Southern Association of Schools and Colleges
- Western Association of Schools and Colleges

HOW DO I SUBMIT AN APPLICATION FOR A CHALLENGE EXAM/FOR CREDIT EXAM?

Follow the steps for submitting an application for Educational Assistance. For the course name enter "EXAM" as well as the official name of the exam you are taking for credit. For example, the course name should be "EXAM: Math 141-Pre-Calculus." As a reminder, NCLEX, CLEP, ACE, DANTES, DSST, UExcel, Excelsior, Straighline and portfolio preparation through Learning Counts or similar PLA providers may be taken for course credit towards a degree program.

SCHOOLS OFFERING PCH EMPLOYEE DISCOUNTS (FULL LIST IS ON PCH4U)

Ashford University

ASU

NAU Northern Arizona University

Grand Canyon University

Arizona Christian University

The University of Arizona

Chamberlain University

Aspen University

Ottawa University

Capella University