Jefferson Tuition Assistance Program Overview

Applications must be submitted 30 days in advance. In accordance with IRS regulations, any tuition benefit in excess of the Federal tax exempt limit (currently $5,250 in a calendar year) will be treated as regular taxable wages and the employee will be responsible for all applicable taxes. For taxation purposes only, tuition benefit amounts will be applied to the calendar year in which they are paid.

### Calendar Year Maximum

<table>
<thead>
<tr>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>90% to maximum $5,000 undergraduate/$7,500 graduate per calendar year</td>
<td>80% to maximum $3,000 undergraduate/$5,000 graduate per calendar year</td>
</tr>
<tr>
<td>All courses that begin in the current calendar year are considered when calculating the maximum amount for the year.</td>
<td></td>
</tr>
</tbody>
</table>

### Eligibility

- Full time, non-bargaining employees are eligible after 60 days of benefit eligible service
- Full time, non-bargaining employees are eligible after 6 months of benefit eligible service

### Requirements

- Credited courses offered in a degree or certificate program
- Courses must be related to position at Jefferson
- Benefits provided for tuition charges only
- Credited courses taken in a program leading towards an Associate, Bachelor, Graduate or Doctorate degree
- Sponsored by an accredited institution through the Council for Higher Education Accreditation List (www.chea.org)
- Courses must be related to position at Jefferson

### Documentation

- For prepayment, please attach an itemized bill indicating the tuition charge for the course. You are required to submit to HR a copy of your final grade within 30 days of course completion. Failure to submit your grade will result in suspension of the tuition assistance benefit and you will need to repay Jefferson for benefits paid on your behalf.
- For reimbursement, applications must be submitted within 6 months of course completion. Please attach an itemized bill, paid receipt and grade report.
- If you are receiving tuition assistance, we will require documentation from the educational institution indicating the amount of the scholarship, grant or award that is applied towards the tuition amount for the courses on your application. This amount will reduce what would otherwise be covered by this program.

### Repayment Terms

- If you do not remain in the employ of Jefferson for one year subsequent to the completion of the courses, you will be required to reimburse Jefferson either through payroll deductions or personal check for the amount of tuition benefits received.
- If you do not satisfactorily complete all courses with a grade C or better, you will be required to reimburse Jefferson either through payroll deductions or personal check for the amount of tuition benefits received.

Additional information pertaining to the Jefferson Tuition Assistance Program is outlined on the Human Resources website, www.jeffersonhr.org, under Jefferson Policies then Tuition Assistance.

Please print clearly when completing the application. Any missing or illegible information on the application will delay payment and may result in a denial of your application.
Jefferson Tuition Assistance Application

Must be submitted with documentation 30 days in advance of payment

1. Employee Information
   Eligibility: □ Full Time, Non Bargaining Employees Only

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Employee Number:</td>
</tr>
<tr>
<td>Home Address</td>
<td>Campus Key:</td>
</tr>
<tr>
<td>City</td>
<td>State:</td>
</tr>
<tr>
<td>Date of Hire</td>
<td>Job Title:</td>
</tr>
<tr>
<td>Work Phone</td>
<td>Work Email:</td>
</tr>
<tr>
<td>Day Phone</td>
<td>Home Email:</td>
</tr>
</tbody>
</table>

2. School Information

**Internal Jefferson School of:**
- □ Health Professions (JSHP)
- □ Graduate Biomedical Sciences (JGSBS)
- □ Nursing (JSN)
- □ Pharmacy (JSP)
- □ Population Health (JSPH)

**External**
Accredited College or University Name: (See www.chea.org for accredited schools)

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semester</td>
<td>□ Fall □ Winter □ Spring □ Summer I □ Summer II</td>
</tr>
<tr>
<td>Year</td>
<td>Student ID: (BS, MSN, etc.)</td>
</tr>
<tr>
<td>Degree Level</td>
<td>Major/Concentration</td>
</tr>
</tbody>
</table>

**Payment**
- □ Prepay directly to school (Jefferson or external institution, you must attach required itemized bill)
- □ Reimbursement to employee after course completion (attach itemized bill, paid receipt and grade report)

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Number</td>
<td>Job Related Course Title</td>
</tr>
<tr>
<td>Credits</td>
<td>Start Date MM/DD/YY</td>
</tr>
<tr>
<td>End Date MM/DD/YY</td>
<td></td>
</tr>
</tbody>
</table>

Are you receiving tuition assistance? Yes □ No □
If yes, amount applied this semester: ________________________

We will require documentation from the educational institution. See overview.

3. Employee Agreement

I have read, understand, and agree to the terms set forth in the Tuition Assistance Policy. I understand that for taxation purposes only, benefit amounts will be applied to the calendar year in which they are paid and that any tuition benefit in excess of the Federal tax exempt limit (currently $5,250 in a calendar year) will be treated as regular taxable wages and I will be responsible for all applicable taxes.

I understand that I will be financially responsible for repaying Jefferson the full amount of the tuition assistance paid for any course if:
   a. I fail to obtain a grade of “C” or better, or
   b. I fail to submit proof of successful completion of a course within 30 days after the course is completed, or
   c. I do not remain in the employ of Jefferson for one year subsequent to the completion of the courses.

Employee Signature: __________________________ Date: __________________________

4. Department Approval
   Is this course related to the employee’s present job? Yes □ No □

Print Name: __________________________ Signature: __________________________ Date: __________________________

5. HR Approval
   □ Approved □ Denied
   Signature/Date: __________________________
   Code: __________________________

   Denial Reason: __________________________