



PROCEDURE

AB41.CSO.PRO

POLICY NUMBER: 2.3.4

CREATED: 07/26/2001

REVISED: 01/12/2023

SUBJECT: Tuition Reimbursement

PROCEDURE

1. Adelante Healthcare (AHC) employees eligible for educational reimbursement must have at least one year of service and be in good standing in all areas of performance, attendance and conduct in their current position.
 - a. Exception: Benefit eligible Employee's taking Spanish may apply for reimbursement after completing 90 - days of service.
2. Part time benefit eligible employees may be eligible for approved courses at a prorated rate based upon number of hours worked.
3. Eligible Employees may be reimbursed only for degrees and courses of study which AHC determines are directly related to the employee's present job or which will enhance the employee's potential for advancement to another position within the organization. This position should be one which the individual has a reasonable expectation of achieving. In addition, courses or programs to be eligible for reimbursement must be offered by accredited institutions of learning.
4. Employees who want educational reimbursement must submit a completed Tuition Reimbursement Form to their supervisor prior to the start of the proposed course(s) and obtain pre-approval. Once the supervisor's approval is received, it is forwarded to People Services for final approval.
5. Supervisors and People Services consider the following factors in evaluating requests for tuition reimbursement:
 - i. The nature and purpose of study;
 - ii. The estimated costs and benefits to be derived by the employee and AHC;
 - iii. The employee's level of responsibility, length of service and overall performance;
 - iv. Any potential lost time or productivity while the employee participates in the program; and
 - v. Current educational level
6. A service agreement or contract may be required to be signed based on the type or amount of a request. All requests will be reviewed by the executive leadership team for approval determination.
7. AHC may pay for reimbursement of tuition and fees of approved schools and classes up to two thousand five hundred dollars (\$2,500.00) annually. Other miscellaneous expenses, including but not limited to parking, supplies, social dues, athletic fees, computer access charges, etc., are not reimbursable. Company reimbursement will be reduced by any other financial aid that does not have to be repaid (such as the GI Bill, scholarships, and grants). Reimbursement is limited to 100 percent of actual expenses for tuition and fees.
8. Employee reimbursement for eligible tuition reimbursement, lab fees and registration are based on a passing grade of a "B" or above for postgraduate work, a "pass" grade on a pass/fail class and "C" grade for undergraduate work.
9. Once the course has been completed with a passing grade as described above, employees must submit to People Services their completed Tuition Reimbursement Form along with a copy of their grade report and receipts for the expenses incurred. AHC will then reimburse to the employee the applicable tuition, lab fees and registration fees. This will be included on the employee's payroll check as a reimbursement.



PROCEDURE

AB41.CSO.PRO

10. If applicable, Adelante may pre-pay some tuition based on organizational need to Maricopa Community Colleges for specific programs.
11. The employee is expected to remain employed with Adelante Healthcare for 24 months following completion of course work. Should the employee leave Adelante prior to completing the required term of service, repayment of tuition and fees will be expected. If the employee is terminated due to a workforce reduction, job elimination or transfer to another AHC site, the employee will be reimbursed for all costs incurred up to the effective date of the personnel action.
12. If employment is terminated voluntarily prior to the fulfillment of the employment obligation, the final paycheck may be withheld as payment of the financial obligation. If such amounts are insufficient to recoup the amount owed by the employee, the employee will be required to execute a promissory note acknowledging receipt of the tuition reimbursement and containing repayment terms and conditions consistent with the contract prior to the employee leaving the institution should employee fail to fully complete the employment requirements of the contract.
13. Employees who, prior to completing an approved course, voluntarily leave AHC or are terminated for reasons other than above, will not be reimbursed for the expenses associated with the course and will need to refund any reimbursement issued in the last 12 months.
14. Employees are expected under normal circumstances to schedule class attendance and the completion of study assignments outside of their regular working hours. However, every effort will be made by AHC to provide flexible working hours upon supervisor consideration of job duties and workload for employees to attend classes which may only occur during normal business hours. It is expected that educational activities will not interfere with the employee's work.
15. Should the employee incur corrective action for attendance, performance or conduct while taking courses the employee becomes ineligible for tuition reimbursement for current course work and cannot reapply for tuition reimbursement for other courses for 12 months from the date of resolution of the corrective action.
16. Funding for this program will be determined each year by the Executive Team at the time of annual budget preparation. All requests are subject to availability of funds and are not guaranteed to be available.
17. The Internal Revenue Service requires employers to report as taxable income, tuition reimbursement benefits for graduate level courses per IRS code (§6050S). It is the responsibility of the employee to be aware of any other tax related impact.

Previously Revised: 9/30/2014, 01/14/2021

PROCEDURE APPROVAL

Chief People Officer:

DocuSigned by:
Audrey Bohanan

DATE: 2/8/2023 | 7:41 AM PST

Chief Executive Officer:

DocuSigned by:
PadoA
4893B08B6DA94DA...

DATE: 2/8/2023 | 10:38 AM MST