

 NORTHEAST OHIO MEDICAL UNIVERSITY	Policy No: 3349-7-45 (HRG)
POLICY TITLE: Educational Benefits	EFFECTIVE DATE: September 10, 2010 REVIEWED AND UPDATED: July 1, 2018
RESPONSIBLE DEPARTMENT: Human Resources	General Personnel

(A) PURPOSE

- (1) To establish a policy for educational benefits provided by the University.

(B) SCOPE

- (1) This Policy applies to full-time faculty, administrative staff, unclassified hourly employees and classified civil service employees who have been continuously employed by the University for a period of six (6) months. This Policy does not apply to student employees or employees leased to affiliated entities of the University.

(C) DEFINITIONS

- (1) Consult University Policy No. 3349-7-01.
- (2) “Partner Universities” refers collectively to Cleveland State University, Kent State University, The University of Akron and Youngstown State University and their branch campuses.
- (3) “Dependent Child” refers to the biological child or adopted child of an Employee. The child must have completed high school, and, at the time that the semester begins, must be under the age of twenty-four (24). If a legal ward or a step child of the Employee, the child must have been claimed as a dependent on the Employee’s latest tax return.
- (4) “Instructional Fees” refers to tuition expenses only.
- (5) “Normal Working Hours” for unclassified hourly employees and classified civil service employees are from 8:00 a.m. to 5:00 p.m. unless otherwise directed by the Immediate Supervisor. Normal Working Hours for faculty and administrative staff will be established by the Immediate Supervisor in consultation with the Department Head.

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- (6) “Spouse” refers to individuals who are recognized as lawfully married under the law of any state or a domestic partner (who has filed an Affidavit of Domestic Partnership with the office of Human Resources in accordance with University Policy 3349-7-30) of a full-time employee.
- (7) “Terminal Degree” is the highest academic degree typically granted in a given field of specialization.

(D) POLICY STATEMENT

- (1) General Information
 - (a) Educational benefits are available to full-time employees who normally work a minimum of forty (40) hours per week on a regularly-scheduled basis and who have an expectation of a minimum of nine (9) months of continuous employment each year. Employees are eligible for payment of Instructional Fees for themselves, their dependents or spouse in the first enrollment period after having been continuously employed by the University for a period of six (6) months.
 - (b) The University will pay for Instructional Fees at one of the Partner Universities for employees, their dependents or spouses who are pursuing a degree in an identified field of study.
 - (c) All employees seeking to utilize educational benefits for themselves, their spouse or their dependent must submit an itemized invoice for all tuition expenses and disclose any scholarships received, public or private, from any entity, including but not limited to the state foundations, civic groups, agencies, religious entities, educational institutions or labor unions.

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- (d) Employees are required to apply for, accept and disclose any institutional scholarships award. Failure to do so may result in disqualification from receipt of future educational benefits.
- (e) Educational benefits will not be decreased when other sources of financial aid are eligible to be used for expenses other than instructional fees (i.e. general fees, other fees, room and board). If other forms of financial assistance such as scholarships, apply to instructional fees, education benefits from NEOMED will be decreased accordingly.
- (f) Educational benefits cannot be transferred to any non-Partner University nor received in any manner other than what is set forth in this policy.
- (g) All other fees, including but not limited to, general, overload, admission, matriculation, parking, bus, dissertation, graduation and special course fees are the responsibility of the Employee. Books, room and board and all other educational expenses are the responsibility of the Employee.
- (h) Non-resident/out-of-state surcharges are the responsibility of the Employee. It is the responsibility of the Employee to contact the Partner University the student is attending to establish permanent residency.
- (i) The University will reimburse employees for fees paid to receive course credit by examination through (CLEP), the College Level Examination Program, or other authorized examinations for course work for which the University otherwise would have been charged.
- (j) Educational benefits will not be paid for continuing education or other non-credit or non-degree courses under this Policy. Job-related, non-credit courses may be paid for separately by the Employee's department.

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- (k) Accelerated programs will be reimbursed at the normal program rate; i.e. executive MBA will be reimbursed at the standard MBA rate for the University.
- (l) No educational benefits will be paid for courses taken by anyone holding a terminal degree.
- (m) Employees who have been laid off, resign, or are otherwise terminated from employment at the University are not eligible for educational benefits and may be required to repay the educational benefit at the point of separation based on the mutual decision of the Human Resources Manager and the Employee's Department Head.
- (n) Instructional fees are paid for any fall or spring enrollment sessions. Effective July 1, 2020, instructional fees for summer enrollment sessions are payable for Employees only.
- (o) In some instances, the receipt of educational benefits under this policy may have tax implications to the employee.

(2) Educational Benefits for Employees

- (a) Educational benefits are limited to payment of Instructional Fees for up to six (6) credit hours per semester for either undergraduate or graduate courses.
- (b) Undergraduate Educational Benefits
 - (i) Educational benefits are limited to the hours required by the attending university for one baccalaureate degree or a maximum of one hundred fifty (150) hours, whichever is less.

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(c) Graduate Benefits

- (i) Educational benefits are limited to fifty percent (50%) of the instructional fees for one graduate degree program that is *not* job related.
- (ii) Educational benefits for job related graduate course work which is approved by the Immediate Supervisor, Department Head, and the Director of Human Resources will be paid at one hundred percent (100%) of the Instructional Fee.
- (iii) Effective July 1, 2020, educational benefits for an employee who has previously obtained a graduate degree and is pursuing a second graduate degree is limited to fifty percent (50%) of the instructional fee, whether or not the degree is job related.

(d) Class Attendance during Normal Working Hours

- (i) In exceptional circumstances, an Employee may be permitted to take one course per semester during Normal Working Hours, provided that satisfactory arrangements to cover the time lost from the normal forty-hour week (for both class time and travel) have been authorized by the Immediate Supervisor, Department Head, and the Director of Human Resources.

(3) Benefits for Dependent Children and Spouses

(a) Undergraduate Educational Benefits

- (i) Educational benefits for each Dependent Child or Spouse are limited to payment of Instructional Fees for part-time or full-time study up to a maximum of the amount charged for a normal full-

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time course load, as established by the respective Partner University.

- (ii) This educational benefit is limited to the number of hours required by the respective Partner University for one baccalaureate degree or a maximum of one hundred fifty (150) hours, whichever is less.

(b) Graduate Educational Benefits

- (i) Educational benefits are limited to fifty percent (50%) of the Instructional Fees for one graduate degree per Dependent Child. Educational benefits are limited to twenty-five percent (25%) of the Instructional Fees for one graduate degree for Spouses.

(4) Benefits for Spouses and Dependent Children of Deceased Employees

(a) Eligibility

- (i) Dependent Children of Employees who were actively employed on or before June 30, 2018 and died after having at least ten (10) years continuous service to the University prior to their death, are eligible to receive educational benefits as set forth herein. Dependent Children or Spouses of Employees hired July 1, 2018 or after are not eligible for educational benefits after the Employee's death.

(b) Undergraduate Educational Benefits

- (i) Educational benefits for each Dependent Child are limited to payment of Instructional Fees for part-time or full-time study up to a maximum cost of the amount charged for a normal full-time course load, as established by the respective Partner University.

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- (ii) This educational benefit is limited to the number of hours required by the respective Partner University for one baccalaureate degree or a maximum of one hundred fifty (150) hours, whichever is less.
 - (c) Graduate Educational Benefits
 - (i) Educational benefits are limited to fifty percent (50%) of the Instructional Fees for one graduate degree per Dependent Child.
- (5) Spouse and Dependent Children of Retirees
 - (a) Educational benefits are extended **only** to Dependent Children of Employees who were hired on or before June 30, 2018 and retire from the University with at least ten (10) years of continuous service to the University. There are no educational benefits for Retirees, their Spouses, or the Dependent Children of Employees hired on July 1, 2018 or after.
 - (b) Undergraduate Educational Benefits
 - (i) Educational benefits for each Dependent Child are limited to payment of instructional fees for part-time or full-time study up to a maximum of the amount charged for a normal full-time course load, as established by the respective Partner University.
 - (ii) This educational benefit is limited to the number of hours required by the respective Partner University for one baccalaureate degree or a maximum of one hundred fifty (150) hours, whichever is less.
 - (c) Graduate Educational Benefits

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- (i) Benefits are limited to fifty percent (50%) of the Instructional Fees for one graduate degree per Dependent Child.

(6) Program Administration

- (a) Eligibility. The Director of Human Resources will administer this program and be responsible for determining eligibility, in accordance with the Policy. The Department of Human Resources may monitor eligibility and may request proof of eligibility at any time. Decisions made by the Director of Human Resources regarding eligibility may be appealed to the employee’s supervisor. If the employee’s supervisor determines that the eligibility decision presents an issue of inequity or fundamental unfairness, the supervisor will forward the appeal to the Chief of Staff and Chief Operating Officer for a final determination on eligibility.
- (b) Grade Reports
 - (i) At the end of each term, the Employee must provide the Department of Human Resources with the appropriate grade reports for the semester within fourteen (14) calendar days of grade release for that class.
 - (ii) If grade reports are not received within the specified time frame, the Employee may be denied educational benefits for the subsequent semester and will be required to seek reimbursement instead of having educational benefits paid on their behalf. The ongoing failure to timely submit grade reports may result in the denials of educational benefits in full.
- (c) Reimbursement and Payroll Deductions
 - (i) Employees who voluntarily or involuntary separate from the University within one (1) year of degree **completion** are required to reimburse the University one hundred percent (100%) of any

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educational benefits paid on the Employee’s behalf (not on behalf of the Employee’s dependents or spouse) within the most recent twelve (12) month period prior to the date of separation. Reimbursement is not required for any Employee who is laid off by the University.

- (ii) Employees are required to reimburse the University for any Instructional Fees for any course in which a grade of “D” or a grade of “F” (or equivalent) has been recorded or if no grade report was submitted to the Department of Human Resources.
 - (a) The first semester of the first year of undergraduate education is subject to “freshman forgiveness”, that is, grades of “D” earned during the first semester of the first year of undergraduate education are exempt from the requirement set forth in D(6)(c)(iii) above. Freshman forgiveness does not extend to the grade of “F”.
- (iii) Employees are required to reimburse the University for any grade of “Incomplete” that is not cleared from the transcript within the year. No further educational benefits will be approved until the Employee has reimbursed the University for the Instruction Fees for the credit hours of the course in which the “Incomplete” grade was received. A grade of "In-Progress" for research hours is not considered an “Incomplete.”
- (iv) The University will not pay for any course that is being repeated.
- (d) It is the responsibility of the Employee to inform the Department of Human Resources of any dropped courses. If an Employee, Spouse or Dependent Child drops a course after the full refund date, the Employee is responsible to reimburse the University for the amount not refunded to the University by the Partner University.

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- (e) Failure to pay any amount owed in full to the University within thirty (30) days of an Employee's receipt of an invoice from the University will result in automatic payroll deduction as individually established with accounting. For amounts owed that are less than \$1,200.00, Employees will have a maximum of six (6) months to reimburse the University. For amounts in excess of \$1,200.00, Employees will have a maximum of twelve (12) months to reimburse the University.
- (f) If an Employee owes the University any outstanding balance of \$250.00 or more at the time an application for Instructional Fees is submitted, the University will not prepay Instructional Fees for that semester. In such cases, an Employee shall be required to pay all Instructional Fees for that semester at the time of registration. An Employee will receive reimbursement of such Instructional Fees minus any outstanding balance upon submitting passing grades and a paid invoice to the University at the conclusion of that semester. Once the Employee's outstanding balance above \$250.00 has been paid, the University will resume prepaying Instructional Fees as provided herein.
- (g) Upon separation from the University, the University shall automatically deduct any balance owed to the University from an Employee's last paycheck, before issuing such paycheck.
 - (i) The Employee has thirty (30) days from the date of separation to pay in full any balance remaining to avoid automatic deduction from their last paycheck.
 - (ii) Any remaining balance owed to the University may be submitted for collection to a collection agency.

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REFERENCES

FORMS

Educational Benefits Application Forms

CROSS-REFERENCE

Leave of Absence without Pay 3349-8-50

REVISION HISTORY

March 20, 1978	R1978-17
August 25, 1986	R1986-29
May 21, 1993	R1993-24
December 15, 2000	R2000-37
October 1, 2002	
September 1, 2009	
October 25, 2013	
June 23, 2014	
May 15, 2015	
July 1, 2018	

LEGAL