

LMP Tuition Reimbursement

This document is intended to describe the tuition reimbursement provisions that apply to employees represented by a union in the National Labor Management Partnership (LMP), per the 2015 National Agreement. It also includes the tuition reimbursement procedures administered by National Tuition Reimbursement Administration (NTRA). Kaiser Permanente regions should include this information for LMP employees in their regional HR tuition reimbursement policies.

1.0 Employee Eligibility

- 1.1 Regular full-time and part-time employees scheduled 20 or more hours per week are considered eligible employees if they have been in an active status for at least 90 consecutive calendar days prior to the course start date.
- 1.2 If the following situations occur prior to course completion, an employee will not be eligible for reimbursement:
 - 1.2.1 voluntary resignation;
 - 1.2.2 discharge;
 - 1.2.3 voluntary change of status to less than 20 scheduled hours per week; or
 - 1.2.4 transfer to unpaid leave of absence

2.0 Eligibility Criteria

Courses are to be taken on the employee's own time and outside regular working hours. Course attendance is not compensable working time unless otherwise required by federal or state law, or by the applicable collective bargaining agreement. Employees represented by a union in the LMP may use tuition reimbursement in conjunction with any applicable education leave for eligible courses.

2.1 Eligible Courses

- 2.1.1 Eligible courses are those offered through an educational institution which has been accredited by the Western Association of Schools and Colleges (WASC) or a regional/local equivalent. Courses offered through the KP School of Allied Health Sciences are also considered eligible courses. Course(s) are to be taken for academic credit (units). A course must be completed with a grade of "C" or better, or "Pass" in cases of "Pass-Fail" or for "Credit" in cases of "Credit/No Credit."
- 2.1.2 Courses must be related to an employee's work assignment or be such as to obviously improve the employee's potential for reasonable career advancement and employability. Courses in music, art, dance, religion, physical fitness or courses related to hobbies will qualify only if they are required for a KP career-related degree or program.
- 2.1.3 Also eligible for reimbursement are courses, certificate programs, workshops, seminars, professional conferences, educational meetings, and special events taken/attended for continuing education units (i.e., CEU, PDU, CME, Contact Hours) in order to advance skills and obtain or maintain position-required

licensure, degrees, or certification, provided they are taken at an accredited institution, professional society, or governmental agency or authorized by these organizations to deliver credentials on their behalf.

2.1.4 When an employee is receiving alternative financial aid for an eligible course through internal or external programs or opportunities:

2.1.4.1 If the employee is required to pay back the financial aid, the employee is eligible for reimbursement under this policy.

2.1.4.2 If the employee is NOT required to pay back the financial aid, the employee is not eligible for reimbursement under this policy. Examples of financial arrangements that are not reimbursable include: loan forgiveness programs, waivers, grants, fellowships, scholarships, and military education benefits.

3.0 Eligibility Exceptions

Employees who are laid off or suffer involuntary (RIF) status reduction will be eligible for reimbursement for classes commencing when the eligibility requirements were met (see Section 2.0). Courses must be completed and all other qualifying criteria met prior to reimbursement.

4.0 Reimbursement of Expenses

4.1 Reimbursement is offered up to \$3,000 per calendar year, based on term or class start date.

4.2 Reimbursement is limited to:

4.2.1 course/class tuition/fee;

4.2.2 travel, room/lodging expenses up to \$500 per calendar year, which is limited to expenses for courses identified in section 2.1.3. [NOTE: The \$500 is included in the \$3,000 reimbursement maximum and is not available for college undergraduate or graduate degree programs. Only certain travel expenses are reimbursable. See additional information on MyHR, under Education Assistance, including how to submit a travel application and supporting documents.];

4.2.3 required textbooks and reading materials used to complete assignments, such as white papers and business reviews; and

4.2.4 laboratory fees.

4.3 The following are not reimbursable expenses:

4.3.1 travel, room/lodging expenses in excess of \$500 per calendar year (see section 4.2.2);

4.3.2 food expenses;

4.3.3 membership or association fees, except when this fee enables access to CEUs. [NOTE: CEUs must be completed and submitted annually and the membership reimbursement is prorated based on the number of years purchased.];

4.3.4 certification or license fees;

- 4.3.5 cost of periodicals, reference books, software, supplies, uniforms, computer or other equipment or other fees related to the course not included in section 4.2;
- 4.3.6 advanced placement tests and credit by exam in lieu of course, including College-Level Examination Program (CLEP);
- 4.3.7 application fees;
- 4.3.8 deferred payment fees;
- 4.3.9 testing/exam fees and graduation fees not specifically included in an approved course/program.

5.0 Application and Reimbursement Procedure

NOTE: Additional information regarding tuition reimbursement is available on MyHR, under Education Assistance.

- 5.1 Employees should submit TR applications directly online through the “Education Assistance” link on My HR.
- 5.2 Employees must apply for tuition reimbursement (TR) prior to the course start date to ensure manager review and acceptance of employee, course eligibility, including estimated travel expenses, before the course/travel begins. Manager approval does not guarantee payment, however. Employees are accountable for reading and understanding their policy. All submitted TR applications are subject to further review by NTRA for employee eligibility, course/school acceptability, appropriate documentation, and available TR benefit, and may be denied if the application does not meet the policy requirements.
- 5.3 Employees should discuss their course plans with their supervisor.
- 5.4 Reimbursement documents (proof of course/event charges and payment, payment invoices and receipts showing course name, cost and method of payment, and class grade reports or certificate completion) must be returned to NTRA within 90 days after the term or class end date. Reimbursement documents are subject to review to support any requested tuition reimbursement. Employees should upload all reimbursement documents directly into their TR application from their MyHR Education Benefit Summary page. [NOTE: NTRA does NOT pre-approve applications. It is the employee’s responsibility to read and understand the policy.]
- 5.5 Employees’ managers are required to review and acknowledge employees’ tuition reimbursement applications.

National Tuition Reimbursement Administration (NTRA) may be contacted at National-TRA@kp.org or 1-866-480-4480 for benefit eligibility verification. For application status, employees may refer to their Education Summary page on MyHR.