

Tuition Reimbursement Policy

Effective Date:	08/15/2006	Review/Revision Date:	12/06/2017
Owner(s) Title:	Dir HR Operations		
Department(s) Affected:	Blue Cross and Blue Shield of Nebraska		

Policy

BCBSNE encourages employees to continue their professional development by enhancing their education and further developing their job skills. It is the policy of Blue Cross and Blue Shield of Nebraska (BCBSNE) to provide a Tuition Reimbursement program to all employees who seek to improve their education or as they prepare for potential advancement within BCBSNE.

Purpose

This policy establishes and outlines the guidelines for reimbursement under the program.

Scope

This policy applies to all full and part time employees. This policy does not apply to interns, contract workers or other workers through a third party vendor.

Policy Statements

Employee Eligibility

- All full and part time employees are eligible to apply for tuition reimbursement after completing 6 months of employment. *Apply for tuition reimbursement* means a formal application submitted for review to the Talent Experience (TE) department prior to beginning classes.
- Eligible employees must have received at least a 3 rating (meets expectations) on the most recent performance review.
 - As defined by the *Performance Management Form*, a rating of *meets expectations* is defined as
 - “...an employee who consistently meets and occasionally exceeds expectations relative to the achievement of essential job duties and demonstrations of performance behaviors.”
- Eligible employees must not be on written warning, final warning and/or on a Performance Improvement Plan (PIP) at time of application. If the employee is on written warning, final warning, and/or PIP at the time of application, the employee is ineligible for a 12 month period from the date of the warning to receive reimbursement under the program.

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Blue Cross and Blue Shield of Nebraska (BCBSNE) reserves the rights to amend, modify, and/or terminate this policy at any time without notice. This policy is not intended to create a contractual relationship with any employee. Each employee of BCBSNE is an at-will employee.

Reimbursement Guidelines

- Eligible reimbursement includes tuition, books, and fees for each course.
- Rate of reimbursement is 100 percent up to an annual maximum defined by the Internal Revenue Service (IRS).
 - Full-time employees - \$5,250.00 per year
 - Part-time employees - \$2,625.00 per year
- A maximum of three courses per semester is reimbursed under this program. Exceptions are made for an employee enrolled in an accelerated program.
- Courses must be taken from an educational institution, which is accredited by a Regional Accrediting Organization recognized by the Council for Higher Education Accreditation (CHEA) and the U.S. Department of Education (USDE).
- Electives which are taken to obtain credits, but are not specifically designated as requirements for a degree and are not job-related, are not reimbursed.
- Graduate-level coursework must relate to the employee's present position or potential advancement within BCBSNE.
- Undergraduate-level coursework must relate to positions and/or departments within the organization (i.e., Healthcare, Business, Information Technology, Human Resources).
- Grants and/or scholarships received will reduce the total reimbursement amount for which an employee is eligible.
- No advances are made for tuition.
- Courses in progress prior to employment and/or the employee's eligibility for the program are not reimbursed.
- An employee is **not** eligible for reimbursement if
 - A grade lower than a C is earned.
 - The course is not completed.
 - Employment is terminated before the payout.
- Certain positions within BCBSNE require professional Credentialing, Licensing or Continuing Professional Education as part of the job requirements. Meeting and maintaining applicable requirements for a position is the responsibility of the employee. Reimbursement from BCBSNE for participating in such programs is at the discretion of the department manager and charged to the department's budget.

Reimbursement Payback

- Employees who terminate employment are required to repay BCBSNE any tuition reimbursement that was received within the last 12 months. The 12 month period is defined as a 12 month rolling back period from the date of termination. This repayment is withheld from the employee's final paycheck.
- Employees holding positions that are impacted by a job elimination as a result of business needs are exempt from the payback requirement.
- Job-related courses and/or seminars attended at BCBSNE's request are exempt from the payback requirement.

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Applying for Reimbursement

- **Before** courses begin, the employee completes the electronic *Tuition Reimbursement Application*. The form must include
 - Degree program and educational institute the employee is attending.
 - Each course name and dates for that specific period.
 - Employee signature and agreement to repay the educational reimbursement within 1 year of completion of a course if employment terminates.
- To be fully reimbursed **after** completion of the course, the following documents must be submitted to the TE department.
 - A full copy of the student statement of account.
 - A copy of the final grade report.
 - Any receipt(s) for the purchase of books that is not reflected on the student statement of account for class(es) being reimbursed.
- The TE department gives final approval for reimbursement ensuring that the employee is eligible under this policy.
- Reimbursement for classes must be submitted within 6 months of completion.
- The employee will receive an electronic notification of approval or denial for a reimbursement after all required documents are received.
- Reimbursement is made through the regular payroll process.
- Copies of all grade reports are retained in the TE department.
- Records of employee's reimbursement are retained for IRS reporting.

References

Tuition Reimbursement Application

Approval

By signing this document, the approver(s) acknowledge that they have read and understand this document and will enforce compliance with the intent and scope of the said document.

Approver Name	Title	Date Approved
Cathy Filipiak	Dir HR Operations	12/6/2017 11:36 AM
Jessica McCormick	Chief Talent Officer	12/6/2017 12:18 PM

Release History

Release	Effective Date	Review Date	Revision Date	Summary	Next Review Date	Completed by
1.0	08/15/2006			Initial release.	08/15/2007	EZ
2.0		10/12/2007		Revision.	10/12/2008	
3.0		06/08/2009		Revision.	06/08/2010	
4.0			04/29/2010	Converted to new template and reviewed.	04/29/2011	C. Filipiak/EZ
5.0			02/14/2011	Review and revision.	02/14/2012	C. Filipiak/EZ
6.0			04/10/2012	Periodic review.	04/10/2013	C. Filipiak/EZ
7.0			01/03/2013	Added books to reimbursements in Policy Statements section.	01/03/2014	C. Filipiak/EH
8.0			12/16/2013	Tom Whalen was removed as an approver and Ovell Barbee was added.	12/16/2014	C. Filipiak/CD
9.0			12/04/2014	The Title was changed and updated throughout the text.	12/04/2015	C. Filipiak/EZ
10.0		12/01/2015		Reviewed, no changes were made	12/01/2016	C. Filipiak/EZ
11.0			11/10/2016	Updated the Approval section.	11/10/2017	C. Filipiak/PB
12.0			12/06/2017	The Scope and Policy Statements sections were updated.	12/06/2018	C. Filipiak/CD

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