

EDUCATIONAL ASSISTANCE APPLICATION

Tuition Reimbursement Certification Tuition Advancement

I. PERSONAL INFORMATION

NAME: _____ LOCATION: _____
 CURRENT POSITION: _____ PERSONAL EMAIL: _____
 STREET ADDRESS: _____ WORK PHONE: _____
 CITY/ST/ZIP: _____ OTHER PHONE: _____
 EMPLOYEE NUMBER: _____ DATE OF HIRE: _____
 SOCIAL SECURITY #: _____ REGULAR FULL TIME REGULAR PART-TIME PRN

II. SCHOOL/ORGANIZATION INFORMATION (you MUST APPLY IN ADVANCE TO RECEIVE BENEFITS):

NAME OF SCHOOL/ORGANIZATION: _____
 ADDRESS: _____
 NAME OF DEGREE: _____ DEGREE COMPLETION DATE: _____
 NAME OF POSITION YOU'RE SEEKING WITH DEGREE: _____

COURSE/SUBJECT	COURSE #	# OF CREDITS	BEGINS	ENDS	TUITION COST
1.					
2.					
3.					
4.					
5.					
TOTAL CREDITS:				TOTAL EXPENSE:	

III. REQUIRED SUPPORTING DOCUMENTS:

- Reimbursements** – attach the semester schedule/bill or registration fees and detailed class schedule at the beginning of the semester. Payment will be made when grades are received.
- Certificates** – attach a registration and fee schedule for advancement and submit proof of passing as soon as it's available. Attach the registration, fee schedule and proof of passing for reimbursement.
- Advancements** – attach the semester schedule/bill or registration fees and detailed class schedule in advance. Books are reimbursed when a detailed receipt is received. Submit grades as soon as they are available, but not later than 30 days.

IV. COURSE OBJECTIVES – MY REASON FOR TAKING THIS COURSE – Check One:

- Provides knowledge directly applicable to my present position at LMHS, or
 Prepares me for a new career opportunity or an advanced position at LMHS, or
 Prepares me for a bedside "Critical Need" position at LMHS

In filing this application for Educational Assistance, I certify that I have read and understand the provisions of the policy (S09 04 209). From the time Human Resources has received all of the required materials, allow 2 weeks for processing advancement payments and 4 weeks for processing tuition reimbursement payments. Checks are issued by Accounts Payable and are mailed to your home.

EMPLOYEE SIGNATURE: _____ DATE: _____

V. SUPERVISOR APPROVAL:

Review and confirm the employee's course objective is beneficial to LMHS Yes No
 Is the employee in corrective action? No Written DML

SUPERVISOR SIGNATURE: _____ DATE: _____

HR USE ONLY – Do NOT Write Below This Line

COMMENTS:

EDUCATIONAL ASSISTANCE AGREEMENT

Lee Memorial Health System offers tuition reimbursement, tuition advancement and certification benefits to all full-time, part-time and PRN employees who have completed one year of employment and nurse refresher reimbursement after 90 days of employment. Refer to the Educational Assistance Policy (S09 04 209) for more detail. Those applying for Education Grants must use that program's agreement.

PROGRAM: For non-critical need positions, employees can obtain Nurse Refresher reimbursement for tuition expense up to \$1,000 and Tuition reimbursement up to \$1,300 per calendar year. The maximum reimbursement for any combination of these programs is \$1,300 per calendar year. For Critical Need jobs as defined in the Educational Assistance policy, employees can obtain advancement or reimbursement of tuition, books and fees up to \$2,500 per calendar year. The maximum reimbursement for any combination of Critical Need benefits and the other programs is \$2,500 per calendar year. Both the \$1,300 and \$2,500 maximum amounts are based on the year in which they are paid, not when the coursework is completed and do not include funds received for Education Grants.

ELIGIBILITY: Full time employees with standard 72-80 work hours biweekly are eligible for a 100% benefit when they have a minimum of one year of employment. Part time and PRN employees with standard hours less than 72 hours are eligible for a 100% benefit for Critical Need degrees and for a pro-rated basis for other non-Critical Need degrees when they have completed a minimum of one year of employment. PRN employees must have worked a minimum of 832 hours in the previous fiscal year to be eligible for this benefit. **EXAMPLE:** A PRN employee going to school worked 1,000 hours last fiscal year and has been employed with LMHS for at least one year. They would receive 48% or \$360.00 reimbursement for their \$750 tuition expense (1,000 hours divided by 2,080 hours in a year equals 48%; \$750 x 48% = \$360.00). Nurse Refresher reimbursement will be provided after satisfactory completion of 90-day probationary period.

TERMS AND CONDITIONS: An employee must work for LMHS 12 months from the date of last LMHS payment for tuition reimbursement, certification and nurse refresher benefits. For a Critical Need benefit greater than \$1300/year, an employee must work for LMHS 18 months from the date of last LMHS payment for tuition reimbursement or 18 months from the course completion if for tuition advancement. Should an employee fail to complete the appropriate work requirement for their benefit, a full or pro-rated balance for the remaining work period not completed would be requested to be returned immediately to LMHS. Repayment would also be required for tuition advancement if a student failed to meet the minimum passing grade as required by the Educational Assistance policy.

In the event the employee fails to meet their work requirement, LMHS will withhold the reimbursement or advancement sum from the employee's final check and Paid-Time-Off (PTO) check in accordance with federal and state laws. If the amount withheld is insufficient to satisfy repayment, the employee agrees to pay the balance within thirty days of their termination date.

DEFAULT: If the employee fails to repay the educational assistance repayment after requested, the amount will be collected without further notice and will accrue interest at the rate of 10% per annum from the date of demand until paid. The employee agrees to pay all attorney fees and costs to collect the amount whether suit be brought or not for collection of same.

Your Educational Assistance benefits may be taxable income in the year it's paid even though it won't appear on your LMHS W-2. For details, refer to IRS Publication 508, Tax Benefits for Work Related Education.

GOVERNING LAW: This agreement is interpreted and enforced according to the laws of the State of Florida.

This agreement is not an employment contract and no representation is made as to term, condition or rights of employment.

Employee Signature

Employee ID Number

Employee Name (PRINT)

Date