

Academic Education Benefit Program

I. Overview

To increase the career building opportunities available to employees at the University of Virginia, enhance the performance of staff members and their units, and encourage professional growth, the University offers an Education Benefit that includes two components: Tuition and Professional Development. These are two separate offerings with different requirements and financial amounts. In addition, departments may choose to offer additional educational benefits through departmental funding.

Education Benefits are paid through your paycheck within two pay periods from the date of approval. Employees are encouraged to submit requests far enough in advance to obtain approval prior to registering for courses.

The final date for annual submission is posted on the [UVA HR Education Benefits page](#).

II. Regulations and Definitions

A. Eligibility

An employee is eligible for Education Benefits if the following conditions apply:

- Currently employed at the University of Virginia in a benefitted position for at least six (6) months by the start date of the class, and intends to, and does, remain on the active payroll during the entire term of the class. For purposes of calculating the six months in service, there may not be a break in service. Eligible service time for this benefit does not include employment at previous state agencies, temp, or wage employment. Eligible service time for this benefit does include prior employment at the UVA Medical Center when transferring directly, and if the former position at UVA Medical Center was benefits eligible while working there. Postdocs who transfer from a stipend-paid non-employee relationship to an employee relationship as Professional Research Staff are able to count their years of service as a UVA postdoc toward eligibility for the education benefit.
- If attending a conference, event, or a non-credit course – then it must be directly related to employee's current position.
- Takes the course for credit, CEU's, or certification in the employee's field of study.
- Successfully completes the course, defined as receiving a grade of "C" or better, or "passing" when the course was taken pass/fail.
- Provides the required documentation (proof of itemized invoice, proof of payment and proof of successful completion) after completion of the course.

B. Qualifying Courses

To qualify for the Tuition Benefit, the employee must be enrolled in for-credit courses working towards Associate's, Bachelor's, Master's, or Doctoral degree or a for-credit Certificate Program. Courses must be taken at nationally recognized (U.S. Department of Education or American Council on Education) accredited colleges, universities, or technical schools. In addition, the employee must receive a grade of "C" or better, or "passing" if course was taken pass/fail.

To qualify for the Professional Development Benefit (which includes professional development classes, certification training, or conferences), courses or events must be job related, career growth related, or a developmental opportunity within their current field. Education must be provided or sponsored by a recognized provider of learning experiences which will be determined by central Human Resources.

The education must meet at least one of the following criteria:

- Contributes toward employee development by updating and enhancing knowledge and skills
- Promotes career advancement
- Taken to complete the requirements for a high school diploma
- Required for job-related professional certification or license
- Enhances the University's ability to respond to current and future needs

Accredited Educational Institutions. Courses must be taken from educational institutions accredited by recognized accrediting agencies and institutions, including those approved under government education and training programs. U.S. Department of Education and American Council on Education Courses will be sources used to verify approval. Visit <http://www.ed.gov/accreditation> for resources about accreditation.

Accreditation site updated: <https://ope.ed.gov/dapip/#/home>

Non-eligible Programs or Expenses. Personal enrichment courses, sports, games, hobbies, workshops, professional licenses, dues, special examinations for admission to degree programs, private consultant refresher courses to take examinations and admission examinations are not eligible for reimbursement. Courses related to mindfulness, yoga and other similar-related courses should be supported through Hoo's Well, or other vendors, and are not part of the Education Benefit program. Books, materials, travel, lodging, and food are not eligible expenses. Subscriptions to learning sites (exceptions: 1-sites that earn CEU's and/or credit toward professional certifications, 2- CBT Nuggets, Code Academy, and Pluralsight for ITS employees), open-ended courses with no required completion date, exam-prep courses, memberships, and application fees are not eligible.

C. Amount of Support

General Terms. The amount of the benefit is calculated based on registration fees (for conferences) and tuition only. Other fees and expenses are not covered under this program (student activity, technology, etc.). Tuition is calculated using the in-state tuition rate (where

applicable), regardless of the residency status of the employee, and is based on the current tuition rate at the time of the request.

Amounts.

The maximum combined Tuition and Professional Development Benefit is \$5,250 per calendar year.

- Tuition and fees needed to successfully complete the course (e.g. technology fees, lab fees, supplemental/differential charges for tuition, online course fees, etc.) up to \$5,250, fees unrelated to academic coursework are not covered.
- Professional Development up to \$2,000 for professional development, including classes, certification training, and conferences.

In addition, departments may choose to offer additional educational benefits through departmental funding. With approval, an employee would submit the department funding request and provide the Cost Center of the department.

Tax Implications. The Internal Revenue Code (IRC) requires reporting and withholding of income and FICA taxes for Tuition and Professional Development Benefits whenever those payments exceed \$5,250 annually for each employee. Tuition reimbursements, exceeding \$5,250 in a calendar year will be considered taxable income and be reported to the Internal Revenue Service. Federal, state and FICA taxes will be withheld on any amount in excess of \$5,250.

Education Benefits are accrued in the calendar year that are received and cannot cross over calendar years.

Examples:

- An employee requests a \$1,500 tuition benefit in December 2022 for classes that begin in January 2023. The \$1,500 is paid in 2022 and accrues in the 2022 calendar year.
- An employee requests a \$1,500 tuition benefit in January 2023 for classes that begin in January 2023. The \$1,500 is paid in 2023 and accrues in the 2022 calendar year.

D. Work Schedule Accommodation

Where possible, employees should plan to take courses scheduled at times that will not require absence from work during regular work hours. The employee will need to check with their supervisor (prior to registration) to determine whether the supervisor can approve a work accommodation request.

The decision to grant a work accommodation for the Education Benefit is at the department's discretion based on the operational needs of the unit.

In the event attendance at an approved course will necessitate an absence during normal work hours, various accommodations are possible, depending on the needs of the unit and the staff

member. Supervisors are encouraged to make a reasonable effort to find an appropriate work schedule accommodation, but it is at the discretion of the supervisor or department.

The following accommodations are possible:

Revised work schedule. An employee may be granted a revised work schedule to enable them to attend a course that could not be scheduled during non-work hours, if the supervisor determines that the employee will be able to meet all the job requirements under the revised work schedule.

Excused absence with use of leave time. In some cases, the needs of the unit and/or the staff member may be better served by permitting a staff member who wishes to take advantage of the Tuition and Professional Development Benefit to use leave time. Any such arrangement is made at the discretion of the unit supervisor.

Release time with pay. In some instances, a staff member may be granted up to 3 hours per week of release time from work with pay if it is related to a degree that is job related. Any such arrangement is made at the discretion of the unit supervisor. The 3 hours per week of release time includes travel time to and from class.

E. Request for Education Benefits

An employee who wishes to take advantage of the Education Benefit must submit the request through Employee Self-Service in Workday.

Note: requests can only be approved within a quarter of the start date (ex: January requests can cover course start dates from Oct of the previous year to April of the current year), and can only be requested once for each class/program (e.g. cannot request funding in December, and funding balance in January).

F. Process for Payment

Upon approval, monies will be deposited through the employee's payroll on the next available pay period. Please allow up to two pay periods to receive payment.

In accepting the Education Benefit under this program, the employee will provide (within thirty (30) days following the end of course or certification) documentation through employee self-service. This will include:

- An official grade report (Tuition Benefit) or appropriate completion document (Professional Development Benefit)
- Itemized invoice
- Proof of payment (paid bill or receipt)

Failure to complete all substantiation steps will result in the full amount of the benefit repayment deduction from the employee's next available paycheck. No additional benefits will be paid until all deductions have been processed.

Employees who leave the University (and are not transferring to the Medical Center), either voluntarily or involuntarily, before successfully completing the course or before reimbursing any amounts owing under this policy, or if an employee does not register for, or stops attending, a course for which he or she has received an education benefits disbursement, the employee is responsible for immediate repayment of the full amount of the benefit disbursement.

G. Source of Funds

Providing Central funding for Education Benefits (Tuition and Professional Development) under this program is the responsibility of Human Resources. Additional departmental funding will be provided by the employee's department if applicable.

Education Benefit payments cannot be made as direct charges to sponsored projects. For employees paid from sponsored projects, the employee's unit is responsible for the costs. Work time off to attend classes is permitted on sponsored projects.

Participants who are covered by tuition resulting from service in the Armed Forces, government aid, or other form of scholarship monies are eligible under this program for only that portion of the tuition support to which they would otherwise be eligible, less the amount of the other benefit.

H. Appeals Process

Employees may appeal an Education Benefit denial. The appeal must be submitted to AskHR@virginia.edu within two weeks of the denial, and should include:

- Subject line: Tuition/Professional Development Appeal
- An explanation how the requested course or conference applies to current UVA work-related role or duties.
- A copy of the curriculum and activities for the course or conference that is being requested.
- Any additional supporting documentation that further demonstrates how the requested course or conference would directly support responsibilities for UVA work-related duties.

A decision will be provided within two (2) weeks following receipt of appeal.