

## Education Benefits Frequently Asked Questions

### FAQs - Eligibility

#### What are Education Benefits?

- Central or departmental financial support for approved educational activities
  - Central Funding for Education Benefit - use of the annual balance of your Education Benefit for funding
    - Academic
      - Tuition funding - courses must earn college credit, and will be taken towards a degree or certificate program at an accredited university or institution
      - Professional Development funding - courses or conferences must be job related, career growth related, or a developmental opportunity within their current field
    - Medical Center
      - Tuition Assistance - courses earning college credit, taken towards a degree program at an accredited university or institution
      - Professional Credentialing Certification - job-related credentialing certifications, or eligible courses (English as a Second Language (ESL), literacy, and related classes, LEAN (or other similar programs) that benefit the Medical Center, review course for professional credentialing certification that is of value/benefit to the Medical Center
  - Departmental Funding - your department is paying for the course, program, or conference (funding for conferences is permitted for Academic Division only) outside of your Education Benefit limits

#### Who is eligible?

- Academic - regular full or part-time benefited employees with more than 6 months of service are eligible
- Medical Center - regular full or part-time benefited employees with more than 6 consecutive months of service in good standing, as well as RN Clinician 1 on day of hire

#### Who is not eligible?

- Academic
  - Temp, wage and other non-benefited employees are ineligible for this program
  - Employees with less than 6 months of consecutive benefited employment

- Medical Center
  - Unit-based, Medical Center pool, Housestaff, temporary, wage, and other non-benefited team members
  - Team Members with less than 6 months of consecutive benefited employment

### **What is an eligible course for tuition?**

- Academic - to be eligible for tuition, employees must be obtaining transferable college credits towards a degree or certificate program at a nationally recognized, accredited institution. These courses do not need to be related to your position at UVA.
- Medical Center - to be eligible for tuition, employees must be obtaining transferable college credits towards a degree at a nationally recognized, accredited institution. These courses do not need to be related to your position at UVA.

### **What is eligible for professional development (Academic employees)?**

- To be eligible for professional development the courses or conferences must be job or career-growth related offerings relevant to your current job.
- The offerings must be provided or sponsored by a recognized provider of professional development experiences.
- Professional development funding can also be used to fund the cost of an initial exam for a job-related professional certification.

### **What is eligible for professional credentialing certification (Medical Center Team Members)?**

- Certifications which lead to credentialing requirements related to your current job
- Must be provided or sponsored by a recognized provider of professional credentialing certification
- Other eligible courses
  - English as a Second Language (ESL), literacy, and related classes
  - LEAN (or other similar programs) that benefit the Medical Center
  - Review course for professional credentialing certification that is of value/benefit to the Medical Center as determined by the department

### **What is eligible for departmental funding?**

- Individual departments can offer departmental funding for things that they deem valuable to their department. These may be ineligible expenses for either tuition or professional development or funding beyond the \$5,250 that is allotted for each eligible employee from UVA central funding. Employees must submit an FDM/Cost Center from the department granting the funds in their request in Workday.

### **Why do I need an FDM/Cost Center for departmental funding?**

- If employees are using departmental funding, then the department has approved for them to use the funds from their department finances for their expense. The department extending this benefit must supply the FDM/Cost Center for their department for the benefit to be paid out from their fund.

### **What are considered ineligible expenses?**

- Academic
  - Personal enrichment courses, sports, games, hobbies, workshops, seminars, management/leadership development programs or courses, special examinations for admission to degree programs, private consultant refresher courses to take examinations and admission examinations
  - Courses related to mindfulness, yoga or other similar related course are not eligible
  - Exam fees (if not an initial exam for certification in a job-related professional organization)
  - Certification and re-certification fees, technology fees, student fees, licensure and re-licensure fees
  - Subscription fees sites (exceptions: 1-sites that earn CEU's and/or credit toward professional certifications, 2- CBT Nuggets, Code Academy, and Pluralsight for ITS employees)
  - Books, materials, travel and lodging and food are ineligible expenses
- Medical Center
  - Professional development programs that are not credit-based classes working toward a degree
  - Certificate programs
  - Professional development programs that are not position required
  - Credentialing certifications that are not related to current job and do not benefit the Medical Center
  - Conferences, personal enrichment courses, sports, games, hobbies, workshops, seminars, management/leadership development programs or courses, special examinations for admission to degree programs, private consultant refresher courses to take examinations and admission examinations
  - License and/or professional memberships
  - Subscription fees to learning sites
  - Books, materials, travel and lodging, and food are ineligible expenses

### **Who makes the decisions on eligible educational activities?**

- Benefits Partners make decisions on what educational activities are eligible based on the Education Benefits Program and IRS regulations.

### **I don't agree with my education benefits decision. What can I do?**

- There is an appeals process for those that do not agree with the decision on their education benefits request. The process is located within the Education Benefits Program.

## **FAQs - Request Education Benefits**

### **How do I request education benefits?**

- Education benefits request are completed through Workday

### **When can I request education benefits?**

- Employees can submit education benefits requests prior to or after the course or event.
- Requests can only be approved within a quarter (90 days) of the start date

### **Why Did I Get An Error On My Request?**

- Click on the red error box in your request for an explanation

### **How can I see the status of my request?**

- See the **View My Approval, Payment Progress, or Request History** section of the job aid

### **Why Did My Request Get Denied?**

- Please see the **View My Approval, Payment Progress, or Request History** section of the job aid
- Common reasons are that the request was outside of the 90 days window, or that the request could not be tied to your current job

## **FAQs - Documentation Requirements**

### **When do I submit documentation for my education benefits?**

- You will receive a task in your Workday inbox the day after your class ends
- You must upload the documents within 30 days of receiving this task

### **What documents do I have to upload to complete education benefits?**

- Academic
  - Itemized invoice and proof of payment
  - **Tuition** – proof of passing grade (“C” or better)
  - **Professional Development Class** – proof of completion

- **Professional Development Conference** – proof of attendance (thank you email, letter/email confirmation from conference, printed program, or screenshot with conference branding)

Type of Education Benefit	Required Proof of Completion/Attendance
<b>Tuition</b>	<b>Required Proof of Completion</b>
Degree related course	Grade report, or transcript
Credit-based certificate	
<b>Professional Development</b>	<b>Required Proof of Completion/Attendance</b>
Conference (job-related): In-person	Photo of your conference ID badge (with branding), a photo of the program (with branding), or an email/letter from the conference administration confirming attendance
Conference (job-related): Virtual	Screenshot of conference (with branding), a thank you for attending email, or an email/letter from the conference administration confirming attendance
Certificate (non-credit based)	Copy of the certificate
Non-Credit Course/Program (CEU's)	Completion certificate, evidence of CEU submission, or an email/letter from the programing confirming satisfactory course completion
Non-Credit Course/Program (job-related)	Completion certificate, or an email/letter from the program administrator confirming satisfactory course completion

- Medical Center
  - Itemized invoice and proof of payment
  - **Tuition** - proof of passing grade (“C-” or better for undergraduate, or a B- or better for graduate courses)
  - **Professional Credentialing Certification** - proof of completion and credentialing certification

### How do I submit documentation?

- Follow the instructions in the job aid
- Contact askhr@virginia.edu if you need assistance

## FAQs - Funds and Payment

### How much funding can I receive?

- Academic - eligible employees are allotted \$5,250 annually for education benefits (\$2000 of the \$5,250 can be used for professional development if the employee chooses)
- Medical Center-eligible team members are allotted \$5,250 annually for tuition assistance/job-related courses, and up to \$375 for professional credentialing certifications
  - RNs may receive up to \$500 for their *initial* professional certification. This applies only to RNs and only to the initial certification.

### How do I get the funds?

- Funding is disbursed through the payroll process, and you will receive the funding in your pay check

**How long does it take to receive the funds?**

- Please allow up to 2 pay periods from the approval date to receive funds in your payroll check.

**Are the funds taxable?**

- Education benefits up to \$5,250 annually are non-taxable
- Taxability over \$5,250 will also apply if individuals receive Medical Center scholarships (i.e. the Annual Nursing Scholarship) or departmental funding.

**Can the funds be paid directly to a school at UVA if I am taking a course at UVA?**

- No. The process must be completed through payroll, and it will be the employee's responsibility to pay the schools.

**Do I have to pay back the funds if I leave my position with UVA?**

- Academic - employees must remain employed by UVA through the end of their course or conference. If employees leave UVA before completing their course or conference, then they will be responsible for repaying the funding amount granted for that course.
- Medical Center - team members must remain employed by the UVA Medical Center for 6 months following receipt of Education Assistance funding. If employees leave prior to the 6-month requirement, then they will be responsible for repaying the funding amount granted for that course. The funding will be deducted from the team member's final pay, as well as by collection efforts for unpaid amounts.

**How do I repay education benefits that I didn't use or need?**

- If employees receive education benefits funding and the course/conference is cancelled, then they would need to repay the amount that they were granted.
- Please send an email to [askHR@virginia.edu](mailto:askHR@virginia.edu) to make a request to return the funds to UVA. This will be completed by a payroll deduction.