
Tuition Reimbursement Policy

Purpose

Effective January 1, 2015, tuition reimbursement is intended to provide assistance to an eligible employee enrolled in coursework that will benefit the products and services Lifeworks offers, while the employee is working for the company. It is a benefit provided to invest in the employee's professional growth and development, with the intent that Lifeworks and the employee will be the beneficiaries of that investment.

Scope

All regular, full-time employees are eligible for reimbursement of tuition for an educational course that can result in a degree, certification, or licensure through an accredited educational institution for the purpose of enhancing job performance at Lifeworks. This may include both undergraduate and postgraduate degree programs, or individual coursework, so long as the program or course has relevancy to Lifeworks' products and services offered.

Eligibility

Requests for tuition reimbursement must meet the following guidelines:

- The course(s) or degree program must be related to the present job duties or to the duties of a different position at Lifeworks. With input from the employee, Lifeworks has the sole discretion to determine course or program eligibility.
- The course or program must be offered through a formal, accredited, institution.
- The course or degree program must be approved at least 60 days in advance of the start date by the employee's supervisor and Human Resources Generalist.
- The course or degree program must be started and completed while the employee is actively working regularly scheduled hours. Employees on leave of absence are not eligible to participate until they return.
- The course must satisfactorily be completed with a "B-" grade or higher, and a "pass" (of a pass/fail system) in order to be reimbursed by Lifeworks. Evidence, such as a transcript, of the grade achieved must be provided.

Application & Approval

To receive tuition reimbursement, employees should follow the steps listed below:

- 1) At least 60 days prior to beginning coursework, the completed Application for Tuition Reimbursement form must be submitted to the employee's supervisor for approval.
- 2) The employee must provide a course description and cost, the name of the institution, and the anticipated completion date, as part of the approval process.
- 3) Upon completion of the course/program, the employee must provide evidence of passing grade, such as a transcript, in addition to an itemized receipt documenting all expenses, to the Human Resources Generalist.
- 4) Provided assignment of a grade of B- or "pass," the employee and the Human Resources Generalist will complete a Tuition Reimbursement Payment Request form.
- 5) Human Resources Generalist will pass along the required information to payroll for processing. A check, separate from the employee's paycheck, will be issued for the reimbursement.

Payment & Repayment

When course/degree program eligibility has been approved by Lifeworks management and Human Resources, the employee may receive reimbursement for up to 50% of tuition, with a \$3,000 yearly maximum. This policy applies only to reimbursement for tuition, and does not cover additional educational costs, such as books or lab fees.

In the case of termination of employment, either voluntarily or involuntarily, while the employee is participating in Lifeworks tuition reimbursement program, or within 12 months of course/program completion, the employee is responsible to repay Lifeworks for 100% of the tuition reimbursement monies provided by the organization. The employee will work with the Human Resources Generalist to facilitate this process.

Policy

It is Lifeworks policy that employees seeking tuition reimbursement must gain approval from their direct supervisor and the Human Resources Generalist at least 60 days prior to beginning a course or degree program, that the course or program must have relevancy to the employee's current position or other positions at Lifeworks, that the employee must achieve a grade of B- or higher, or "pass," and the employee must agree to repay the to be eligible for tuition reimbursement upon termination, to be eligible for this program.

Lifeworks has the right to request proof of institutional accreditation, proof of employee grades earned, and proof of all costs associated with enrollment in coursework.

Lifeworks has the right to change eligibility requirements, or cancel this program at any time, for any reason.

Rights & Responsibilities

It is Lifeworks policy that the employee requesting tuition reimbursement complete all required steps as listed above to receive payment in accordance with this policy.

The employees may escalate any issues to the Vice President of Human Resources for review.

Resources

Tuition Reimbursement Process
Tuition Reimbursement Procedure

Procedure for Tuition Reimbursement

Persons Responsible:

- 1) Employee (Requestor)**
- 2) Human Resources**
- 3) Supervisor**
- 4) Payroll**

Purpose:

Effective January 1, 2015, tuition reimbursement is intended to provide payment while an eligible employee is enrolled in coursework that will benefit the products and services Lifeworks offers, while the employee is working for the company. It is a benefit provided to invest in the employee's professional growth, with the intent that Lifeworks and the employee will be the beneficiaries of that investment.

Procedure:

- 1) At least 60 days prior to the beginning of the course, full-time employee completes an Application for Tuition Reimbursement and submits it to supervisor through email, fax and office mail box.
- 2) The supervisor, employee, and Human Resources meet to review institution, program, and courses for eligibility and approval.

- 3) If tuition reimbursement approved, employee attends class and attains grade of at least B-, or "pass" in a (pass/fail system.)
- 4) Human Resources tracks employee information on spreadsheet, housed in the I-drive, and files Application for Tuition Reimbursement in employee's personnel file.
- 5) Upon course completion, employee shares with Human Resources the grade achieved.
- 6) Provided grade is B- or higher/"pass," employee and Human Resources complete Tuition Reimbursement Payment Request form.
- 7) Human Resources submits form to payroll for processing.
- 8) Payroll issues check to employee for reimbursement, for up to 50% of course cost, with a \$3,000 annual maximum.
- 9) If employee's employment is terminated during the course/program for which reimbursement was received, or within 12 months of completion, the employee is responsible for repaying the total amount of tuition reimbursement which Lifeworks paid.

Public Service Loan Forgiveness Form