

Title: Education Assistance

Applicable Campus: Salem and West Valley Hospitals	Department Name: Human Resources
Approved: March 2006 Effective: April 2006	Next Review Date: March 2006

Describe briefly the most recent revision made to this policy, procedure or protocol & why:

Combines a number of current policies and practices and includes changes and additions. The Education Assistance Policy includes: Tuition and Re-certification Reimbursement, Initial Certification Repayment, Chemeketa Waiver Program, Education Loan Repayment Program, Conference Attendance, Back to School Program, and the Career Path Assistance Program. Additions include: Re-certification Reimbursement, Conference Attendance, Back to School Program, and the Career Path Assistance Program. This policy will result in archiving the following HR policies: Tuition Assistance Policy & Procedure, Certification Costs Policy & Education Loan Repayment Program Policy & Procedure

Purpose/Policy Statement:

It is the vision of Salem and West Valley Hospitals to be the employer of choice. As part of achieving the vision, the Hospitals are committed to providing financial assistance and/or career development opportunities in support of employee career goals that are directly related to the organization's success.

Definitions:

- n/a

CONTENT

Salem and West Valley Hospitals are competing for a wide range of talent to deliver quality service and performance in identified Core Commitments. The following programs provide financial support for education and certification endeavors undertaken by staff. The objective of these programs are to maintain and enhance workforce competency and to encourage career and personal development in alignment with the Hospitals' mission and vision. Programs are designed with a focus on employees who achieve and maintain satisfactory performance and demonstrate a sincere interest in healthcare. These programs include Tuition and Re-certification Reimbursement, Initial Certification Reimbursement, Education Loan Repayment, Chemeketa Community College Waiver, Conference Attendance, Back to School Program, and Career Path Assistance. For program descriptions, eligibility, and steps to apply, refer to the tables below.

Tuition and Re-certification Reimbursement

Tuition and re-certification reimbursement supports employees pursuing:

- Formal education that is job-related or leads to a degree employable at Salem and West Valley Hospital
- Degree certificate programs requiring enrollment in a course at an accredited educational institution and completing coursework.
- Approved re-certification that enhances professional knowledge and skills in our workforce.

Tuition and re-certification reimbursement covers tuition, fees (including parking) and books if required, and re-certification costs (up to annual maximums).

Annual amounts available for reimbursement:
Job related courses & *Re-certifications only:
\$1,500

Associate Degree programs: \$1,500
Bachelor Degree programs: \$2,000
Graduate Degree programs: \$2,500
(Includes Master's, JD, Doctoral, etc.)

*Reimbursement for re-certifications count toward the annual maximum reimbursement amounts above in which the employee is accessing, depending on the education level category. \$1,500 is the annual amount available for employees seeking reimbursement for re-certification where there is no attendance in formal education.

The annual maximum is based on the Hospitals' fiscal year, which runs from 10/1-9/30. This limit will apply to the fiscal year in which your course ended.

- Regular full-time or part-time (20+ hours per week) employee after completing initial introductory period. May go to U-status while completing degree/course/re-certification and return to regular status upon completion of degree/course/re-certification.
- No corrective action (written reminder stage) within the last six months.
- Qualifying courses must be taken and passed with a "C" (pass) or better.
- Re-certifications are reimbursed as long as they are kept current and job related. Certifications allowed to lapse and then re-applied for will not be reimbursed.
- The re-certification must be on the approved list for your current department. If you don't find the certification on the list, or if your department doesn't have a list, please check with your manager.
- It is the expectation of the Hospitals that an employee using tuition and re-certification reimbursement will remain employed with the Hospitals in accordance with the intent of the education assistance benefit.

- 1a. Check with HR to determine if your course or program is eligible for coverage.
- 1b. Check the approved certification list in your department or see your department manager to be sure that your desired re-certification is recognized within your department.
 - i. Obtain manager approval using the Manager Pre-approval: Conference Attendance, Initial Certification and/or Re-certification form (see Attachment A) prior to signing up for re-certification.
2. Pay for and take course/re-certification.
3. Submit the Education Assistance Application (see Attachment B), proof of successful course or re-certification completion, proof re-certification has not lapsed and Manager Pre-approval: Conference Attendance, Initial Certification and/or Re-certification (if applying for re-certification), and detailed receipts of fee payments to HR within 60 days of course/re-certification completion.
4. HR will review for approval. Please allow at least 4 weeks for processing.

Program Name and Description	Eligibility Requirements	Steps to Apply
<p>Initial Certification Reimbursement</p> <p>The initial certification reimbursement program repays job-related and approved certifications that enhance professional knowledge and skills in our workforce, dependent on department budget availability.</p> <p>To qualify, the initial certification must be on the approved list for your current department. If you don't find the certification on the list, or if your department doesn't have a list, please check with your manager.</p> <p>Certification reimbursement is approved by managers and is paid out of the department budget. Generally, an employee will be reimbursed for the certification exam cost after successful completion of the certification.</p> <p>The initial certification must be accomplished while employed at Salem and West Valley Hospitals, and submitted within 60 days of completion.</p> <p>Re-certifications are reimbursed under the Tuition Reimbursement program, above.</p>	<ul style="list-style-type: none"> • Regular full-time or part-time (20+ hours per week) employee after initial introductory period is successfully completed. • No corrective action (written reminder stage) within the last six months. • Certification must be on the approved list for current department. 	<ol style="list-style-type: none"> 1. Check to be sure your desired certification is on the approved list for your department, or see your manager. <ol style="list-style-type: none"> i. Obtain manager approval using the Manager Pre-approval: Conference Attendance, Initial Certification and or Re-certification form (see Attachment A) prior to signing up for certification. 2. Complete the Request for Authorization to Attend Meeting and/or Travel form (see Microsoft Word Templates, General folder) for pre-approval of expense. 3. Pay for and successfully complete certification. 4. Upon successful completion, submit to your manager: the Request for Payment (see Microsoft Word Template) with proof of successful completion, costs to be reimbursed, and the approved Request for Authorization to Attend Meeting and/or Travel no later than 60 days of completion. 5. Allow 4 weeks for processing.

Program Name and Description	Eligibility Requirements	Steps to Apply
<p>Chemeketa Waiver Program</p> <p>The Chemeketa Waiver Program allows employees to waive up to \$300 per term in tuition fees at Chemeketa Community College. To be eligible, the coursework must be formal education taken for credit, that is job related or leading to a degree employable at Salem and West Valley Hospitals. If you are unsure whether your course will qualify, check with HR.</p> <p>If a course is dropped after registering, using the waiver, you will need to notify Chemeketa Community College of the cancellation. If you drop the course after the published deadline, you will be responsible for the cost of the course, payable to Chemeketa.</p>	<ul style="list-style-type: none"> • Regular full-time or part-time (20+ hours per week) employee after initial introductory period completed. • No corrective action (written reminder stage) within the last six months. • It is the expectation of the Hospitals that an employee using the Chemeketa Waiver will remain employed with the Hospitals in accordance with the intent of the education assistance benefits. 	<ol style="list-style-type: none"> 1. Complete the Education Assistance Application (see Attachment B) indicating the class(es) in which you intent to enroll, the number of credits, and tuition costs. 2. Submit the completed application to HR for approval prior to course start date. 3. Upon HR approval, submit approved application to Chemeketa Registrar/Admissions office for tuition amount to be waived and enroll in class(es). <ol style="list-style-type: none"> a. If already enrolled in course(s), Chemeketa must receive the approved application no later than 9 days after enrollment. 4. Take course(s) at Chemeketa. 5. If a course is dropped after registering you will need to notify Chemeketa of the cancellation. If you drop the course after the published deadline, you will be responsible for the cost of the course, payable to Chemeketa Community College.

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<p>Education Loan Repayment Program</p> <p>The education loan repayment benefit offers recent graduates, from a program that led to their current occupation in a position in demand, an interest-free loan to pay off outstanding student loans.</p> <p>The program offers repayment of outstanding student loans (principle amounts, interest is not eligible) up to a maximum of the degree totals listed below or the whole loan, whichever is less. Payments will be made in \$2,500 increments directly to the financial institution every 6 months until the maximum eligible amount for degree (below) or total amount due to the financial institution, whichever is less, is paid.</p> <p>Degree totals are \$5,000 for Associate degrees, \$10,000 for Bachelor degrees, and \$20,000 for Graduate degrees. The lifetime cap of funds available under this program to an employee is \$30,000.</p> <p>The amount of the Hospitals' payment on behalf of the employee will be considered a loan to the employee and will be forgiven at \$2 for every hour worked after loan acceptance. As long as employee remains employed and in eligible status as defined in this policy, no interest accrues on the loan.</p> <p>If the employee leaves Salem and West Valley Hospitals, drops below a regular scheduled position (20 + hours per week), or leaves the position in demand before the entire loan is repaid, the payment schedule will be as follows:</p> <ul style="list-style-type: none"> • If the balance of the loan is \$500 or less, the amount is due in full. • If the balance of the loan is between \$500 and \$2,000 payment will be made in regular monthly payments over the course of twelve (12) months. • If the balance of the loan is above \$2,000 the balance will be subject to the prime interest rate, plus one percent. The individual will be required to repay the loan amount in 24 equal monthly payments due by the 10th of each month. The total amount to be paid in full at the end of the 24-month period. 	<ul style="list-style-type: none"> • Employee must be a recent graduate in a regular full- or part-time (20+ hours per week) position that is designated as a position in demand. • Employees must have successfully completed six months of continuous regular full-time or part-time (20 + hours per week) employment. • Educational program must have been completed within the last 3 years from application submission. • Evidence must be provided that education is complete and with a minimum "C" or "pass" average. • No corrective action (written reminder stage) within the last six months. 	<ol style="list-style-type: none"> 1. Check Human Resources for designation of positions in demand. 2. Complete the Education Assistance Application (see Attachment B) and submit to HR including a copy of the degree, certification, or diploma, copy of your final transcript indicating at least a 2.0 GPA, and a copy of the loan agreement and most recent loan statement that includes the amount due and the reason it was obtained. <ol style="list-style-type: none"> a. By submitting an application, you are agreeing to the terms set forth in the policy. 3. Allow 4 weeks for processing and approval process.

Program Name and Description	Eligibility Requirements	Steps to Apply
<p>Conference Attendance</p> <p>With approval from department manager, employees may attend Hospital-paid conferences identified to be in line with department and organizational goals. This is dependent on department budget availability.</p> <p>Expenditures for travel in connection with educational or professional meetings will be approved only when such travel is determined to be to the Hospital's benefit and when necessary for improved Hospital management, improved patient care, or improved professional capability. There may be a limit to how many employees the Hospitals will sponsor per event based on budgetary and/or patient care constraints.</p> <p>In-house training of employees should be utilized as much as possible to increase development while keeping unnecessary expenditures low.</p> <p>If travel is required and approved, the Finance Travel Policy will apply. See the Travel and Conference Attendance Pay Policy to determine if time spent traveling or attending the educational event should be paid.</p>	<ul style="list-style-type: none"> • All employees after successful initial introductory period completed. • No corrective action (written reminder stage) within the last six months. 	<ol style="list-style-type: none"> 1. Find a conference that supports professional development and is in line with department and organizational goals. 2. Complete the Request for Authorization to Attend Meeting and/or Travel (see Microsoft Word Templates, General folder). 3. Department Authority will determine whether the request will be approved based on staffing, funding, and departmental need. 4. Upon approval from the department authority, submit to Accounting a Request for Payment form (see Microsoft Word Template) with proof of payment or cost.

Program Name and Description	Eligibility Requirements	Steps to Apply
<p>Back to School Program</p> <p>The Back to School Program is designed to engage our talent in growing expertise in shortage areas and/or areas presenting a difficult recruitment challenge. The Hospitals project specialty skills, diversity, and/or operational needs that require active support of specific educational programs for selected candidates. This program provides employees the opportunity to pursue educational goals while maintaining full-time status but working a reduced schedule. Back to School positions are typically regular full time benefit-eligible positions working a flexible part time schedule (20 + hours per week) to support a school schedule. In addition to flexible and reduced hour work weeks, additional financial assistance may be provided to fund education costs. These positions are available on a limited basis as determined by organizational priorities.</p> <p>Available Back to School Position(s) are posted on the Salem & West Valley Hospital's job website with other available positions. While the position will be flexible to accommodate a school schedule, the employee must be flexible to work weekend and night shift if requested. Participation in the Back to School program requires a written and signed agreement between the Hospitals and the selected candidate(s).</p>	<p>Department</p> <ul style="list-style-type: none"> • Complete Back to School Program Proposal and obtain approval. <p>Applicant</p> <ul style="list-style-type: none"> • No corrective action within the last six months, if an employee of the Hospitals. • If the candidate is external, they must meet the guidelines set forth in the conditions of employment guidelines and go through the regular recruitment processes. • Meet requirements indicated in the education position posting. • Successfully complete the application process. • Fulfill the terms set forth in the signed agreement between the Hospitals and employee. 	<p>Department Applying</p> <ol style="list-style-type: none"> 1. Department Director completes the Back to School Program Proposal (see Attachment C). 2. Obtain Division Vice President approval. 3. Submit proposal to Human Resources for review. 4. Human Resources notify Department Director if there are additional questions or if approved. 5. Please allow at least 4 weeks for processing. <p>Applicant Applying</p> <ol style="list-style-type: none"> 1. Visit job openings on the Salem and West Valley Hospitals internet or intranet website. 2. Successfully complete application process and apply online. 3. If you are selected for the position, details will be worked out with the department manager and Human Resources. 4. An agreement will be executed between the Hospitals and selected candidate(s).

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<p>Career Path Assistance Program</p> <p>The Career Path Assistance Program is available to all employees to explore careers, further education, and other developmental activities. The Health Careers Specialist is available to help individuals with their planning and exploration as needed.</p>	<ul style="list-style-type: none"> All Salem and West Valley Hospital employees are welcome to participate. 	<ol style="list-style-type: none"> Click on the Human Resources link on the intranet. Click on the Employment link, then Employee Career Path Assistance and explore your options. Complete the application and meet with the Health Careers Specialist.

Equipment/Supplies (If Applicable):

n/a

Form Name & Number or Attachment Name (If Applicable):

Attachment A – Manager Pre-approval: Conference Attendance, Initial Certification and or Re-certification

Attachment B – Education Assistance Application

Attachment C – Back to School Program Proposal

Request for Authorization to Attend Meeting and/or Travel – see Microsoft Word Templates under the General folder

Request for Payment - see Microsoft Word Templates

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References (Required for Clinical Documents):

n/a

Is there a Regulatory Requirement? Yes No

If yes, insert requirement information here:

Review History (No Changes):

n/a

Revision History (Note changes in area under header):

n/a

Computer Search Words:

Education, Tuition, Chemeketa, Loan, Repayment, Certification, School, Career

Policy, Procedure or Protocol Cross Reference Information:

Travel Policy and Travel and Conference Attendance Pay Policy