

Citizens Inc.

Tuition Incentive Program Policy & Procedure

Citizens Inc. will reimburse Part time employees for up to 3 credits per semester and Full time employees up to 6 credits per semester. Part time staff who work 21-29 hours a week are eligible for up to three (3) credits tuition assistance for the fall, spring, and summer sessions. Full time employees who work 30 hours or more a week are eligible for up to 6 credits per semester for the fall, spring, and summer semesters. Citizens Inc. reimburses staff at the current SUNY/CUNY rates as indicated on their website. Tuition assistance for winter sessions are not covered.

Reimbursable semesters are defined as follows:

Full time staff:

6 credits for the fall semester
6 credits for the spring semester
6 credits total for summer sessions

Part time staff:

3 credits for the fall semester,
3 credits for spring semester,
3 credits total for summer session

Participant Requirements:

1. Employee must be employed with the agency a minimum of six (6) months prior to the semester's deadline for application submission and must be employed as either part time or full time and is in active status in UltiPro.
2. Employee must have completed orientation & all training requirements for position

For each upcoming semester, the Training and Professional Development Department will send the Tuition Incentive Application and Policy Acknowledgement form to Assistant Directors and Program Coordinators as well as any staff member who expresses interest in the program. At this time, the Training and Professional Development department will also post the current application and policy acknowledgment form on AHRC Connect.

All sections of the application must be completed and signed by the Program's Director in order for the application to be considered. The employee is responsible for adhering to the deadline dates for application submission which are as follows:

- A. Fall semester – July 31st**
- B. Spring semester – November 30th**
- C. Summer semester – May 31st**

All completed applications are to be submitted to the attention of Suprena Joseph by either email (tuition@ahrc.org), fax (1-516-470-9056), interoffice mail, or in person.

Once the applications are received they are reviewed for the following by the Training and Workforce Development Department and data will be tracked in an Excel spreadsheet:

1. The tuition application is completed in its entirety and signed by the Program Director
2. The tuition policy acknowledgement form is signed by employee.
3. Intended degree and its relevance to the current position
4. Confirmation of the employee's status in Ulti-Pro with regard to length of employment required, full/part time status, and listed as active status

The tuition incentive application must be approved by the Program Director who will consider if the coursework is job related or leads to a degree, certification or to the acquisition of a new skill which would directly benefit the agency and people supported. Once approved and returned, the date of approval will be recorded in Excel.

An approval notification will be emailed to the employee by the Training and Professional Development Department to the email address provided on the application by the 15th of the month following the semester deadline for application submission.

Any applicant who does not meet the program requirements will receive notification of such with an explanation as to why the application has been denied by the 15th of the month following the

semester deadline for application submission. If denied, the employee may appeal the decision to the Director of Human Resources.

No employee is approved for the program until they receive an approval email from the Training and Professional Development department.

Approved applicants are required to submit documentation indicating a minimum grade of "C" or "P" for the classes listed on the tuition application, as well as a **final** billing statement indicating the semester tuition, a breakdown of all fees, loans, grants, etc., and the amount paid. All grades, required coursework documentation, and tuition bills must be submitted no later than two months after the attended semester; failure to meet this deadline may result in forfeit of reimbursement.

Once received, the semester grades and invoice will be reviewed and a reimbursement packet will be processed by the Training and Workforce Professional Department. The completed packet and check request will then be signed by the Assistant Director of Training and Professional Development. The signed packet is then sent via interoffice mail to the Executive Office in Brookville for review and final authorization. Once authorized, the Executive Office will forward the tuition packet to the accounting department who will then process a reimbursement check for the employee. The reimbursement check is sent to the employee's address listed on the tuition application.

In view of Citizens Inc.'s extra investment in the employee, an employee who participates in the tuition incentive program is expected to remain employed with the agency for a period of at least one (1) year following the completion of any tuition incentive sponsored coursework. Employment within this timeframe must continue in a full time or part time capacity. Failure to adhere to this policy will subject the employee to repayment of all tuition incentive benefits awarded.

Citizens Inc. must report any tuition assistance over \$5,250 each calendar year. In accord with the IRS Publication 15-B, Educational Assistance, The IRS mandates that Citizens Inc. must withhold and remit payroll taxes for any tuition assistance benefit over \$5,250 given to an employee each calendar year.

All reimbursements paid within the tax year are subject to the above regardless of the semester year being processed. Employees are responsible for ensuring timely submission and Human Resources for the timely processing of such reimbursements to the employee

Withholdings are processed on a cash basis and does not consider the semester year being processed. Employees are responsible for ensuring timely submission and Human Resources for the timely processing of such reimbursements to the employee

Please note: An employee may attend a non CUNY/SUNY school but will only be reimbursed for the actual cost per credit up to the current CUNY/SUNY rate. The rate will be determined by the agency based on tuition information for the semester indicated by the CUNY/SUNY school.

ACKNOWLEDGEMENT OF POLICY RECEIPT:

Employee signature _____ **Date:** _____