



TUITION REIMBURSEMENT

Eligibility	Full time/part time benefit eligible status with 180 days of continuous service
Application	Must apply no more than 120 days prior and 30 days after the course has begun
Documentation	Documentation must be submitted within 60 days of course completion - grades and proof of payment
Coverage	Certain fees and books are covered in addition to cost of tuition
Manager Approval	No approval needed
# courses	Limited to 4 per application
Annual Amount	Under Graduate Full Time \$4500 Under Graduate Part Time \$2250 Graduate Full Time \$5250 Graduate Part Time \$2625
Good Standing	Colleague must be in "Good Standing"
Status determination	Employee's reimbursement amount is determined by status as of the first day of the calendar year
Intersession	When a course straddles calendar year (i.e. 2020-2021 winter intersession) reimbursement amount is determined by the END DATE of the course. If colleague has a remaining balance of \$1000, max reimbursement would be the cost of the course up to the annual allotment.
Work Commitment	A colleague must remain continuously employed in a benefit eligible status for 12 months
Leave of Absence	An Employee who goes on an approved leave of absence that is not an elective personal leave of absence after submitting an Application for a course or program will receive reimbursement under this policy

Tuition Reimbursement EdCor

Tuition Reimbursement

General Description

This article provides instructions on how to apply for tuition reimbursement and provides answers to questions associated with the Tuition Reimbursement Program Policy ("Tuition Reimbursement Policy").

Applicability/Eligibility

- This article generally applies to all regular full-time and regular part-time benefits-eligible colleagues, unless specifically excluded by the terms of a collective bargaining agreement or the colleagues have employment contracts or agreements that provide for different tuition reimbursement benefits. Regular full-time and regular part-time employment status is determined in accordance with the ministry's or subsidiary's Employment Classification Policy or Procedure.
- Benefits eligibility for purposes of the Tuition Reimbursement Policy is determined in accordance with Human Resources System-Wide Procedure No. 101 (Eligibility for Coverage Under the Trinity Health Corporation Welfare Benefit Plan).
- Colleagues must have completed at least 180 days (6 months) of continuous employment with Trinity Health, a ministry or subsidiary in order to be eligible to receive reimbursement for eligible expenses under the Tuition Reimbursement Policy.
- A colleague who receives a reimbursement for a course or program must remain continuously employed by Trinity Health, a ministry or subsidiary in a benefit-eligible status for at least 12 months after completion of the course or program.

Key Points

Reimbursement Benefits

You will generally receive reimbursement for up to 100% of the eligible expenses you pay for courses or program (if the courses in the program are not paid for on a course-by-course basis), up to the maximum reimbursement amount you are eligible to receive for the year (the "annual cap"), if you satisfy all of the requirements set forth under the Tuition Reimbursement Policy.

The annual cap is defined by your ministry or subsidiary and is applied based on the amounts reimbursed in a calendar year regardless of when the courses are taken.

Benefit Requirements

- You must remain employed in a benefits-eligible position and in good standing with Trinity Health, a ministry or a subsidiary during the period that starts with the date the course or program begins and ends with the date of reimbursement for the eligible expenses you paid for that course or program.
- You must successfully complete the course or program as follows:
 - "C" or better grade for undergraduate course or program
 - "B" or better grade for graduate course or program
 - "Passed" or "Satisfactory" for course or program where a letter grade is not provided

Key Steps

Trinity Health has partnered with Edcor Data Services ("Edcor") to provide a comprehensive web-based solution for managing education expense reimbursement.

You will utilize Edcor's web portal to:

- Obtain approval for coursework if applicable
- Apply for and request tuition reimbursement
- Upload grades and payment receipts (including required fees and books)
- Review historical application history
- Request appeals if an application is denied or rejected
- Escalation of all issue(s) related to the program

FAQs

1. What expenses are not covered under the Tuition Reimbursement Program?

- Workshops, seminars, conferences, conventions, and continuing education classes and licensing or other similar kinds of short courses;
- Tools or supplies which may be retained by the colleague after completion of a course of instruction;
- Meals, lodging, travel, field trips or transportation;
- Any benefits with respect to, any course or other education involving sports, games, or hobbies;
- Late or non-payment fees or finance charges; and
- Parking, permits, internet connectivity fees and student activities.

2. Are contingent colleagues eligible for tuition reimbursement benefits?

No, except for Fellowship colleagues. The 180-day employment requirement is not applicable to Fellowship colleagues. All other

eligibility requirements as outlined in the Tuition Reimbursement Policy must be followed for Fellowship colleagues to receive reimbursement.

3. How do I know if my school is accredited for tuition reimbursement?

Accreditation is a status granted to educational institutions found to either meet or exceed academic quality standards established by an accrediting agency through an assessment process.

In accordance with the Tuition Reimbursement Policy, all courses must be taken at a regionally or nationally accredited educational institution that is Title IV approved. Schools listed on the Tuition Assistance website:

<https://trinityhealth.tap.Edcor.com> have been determined by the Department of Education to be accredited and are eligible for your program. If your school is not listed, or if you have questions about accreditation, contact your school directly or call Edcor at 1-844-344-2716.

4. What determines the annual cap/ How do I find out my annual cap?

A colleague's annual cap for a calendar year is based on the colleague's full-time or part-time status as of the date the Application is filed. You can also contact Edcor at 1-844-344-2716 to obtain your employer's annual cap for a calendar year.

5. How do I submit an application?

You will submit your application through Edcor website <https://myapps.microsoft.com> Once you access the Myapps link, you will route to the Edcor icon.

6. Is there a deadline for submission of my application request?

Yes. Applications requests must be received no earlier than 120 days prior to the term start date and no later than **30 days after the term start date**. It is important to note that a failure to submit your application request within this timeframe will result in a rejection.

7. May I submit an application for more than one course at a time?

Yes. You can apply for up to four (4) classes or courses per application. This is strongly recommended if all your courses are being taken during the same term.

8. How do I know when my application is approved?

After your application has been reviewed to ensure that it meets the requirements of the Tuition Reimbursement Policy guidelines, you will be notified via email of the final decision on your submission

9. How do I apply for tuition reimbursement?

Go to <https://myapps.microsoft.com> Once you access the Myapps link, you will route to the Edcor icon.

Note: You may contact Edcor at 1-844-344-2716 for assistance navigating their system.

10. Does my employment status affect my reimbursement?

Yes, as the colleague must remain employed in a benefits-eligible position and in good standing with Trinity Health, a Ministry or Subsidiary during the period beginning on the date a course or program begins and ending the date of reimbursement under this Policy for the Eligible Expenses the colleague paid for that course or program.

11. What documents are required to obtain my reimbursement?

The following paperwork is required for reimbursement:

- Itemized receipt showing the difference between tuition and fees includes a school identifier and the student name/ID
- Grade report indicating the course name, grade earned, school identifier and student name/ID
- Book receipts (if applicable)
- Proof of payment (Deferral agreement OR proof you have paid your institution prior to requesting reimbursement).

Eligible and Non-Eligible Expense(s)

Expenses Eligible for Reimbursement

Only Eligible Expenses are reimbursable under this Policy. "Eligible Expenses" are expenses for the tuition, required course fees, and books, supplies (except as provided below) and equipment, including sales tax and shipping fees, for courses that:

- A. Are part of an Eligible Program; and
- B. The Employee attends outside of his or her regularly scheduled work hours.

*Below are examples of items that are **NOT** eligible for reimbursement- This is not an all-inclusive list*

Eligible Expenses do not include payment for, or the provision of:

- Workshops, seminars, conferences, conventions, and continuing education classes and licensing or other similar kind of short courses; (Prerequisites, Re-certifications, and certificates)
- Tools or supplies which may be retained by the Employee after completion of a course of instruction.
- Meals, lodging, travel, field trips or transportation.
- Any benefits with respect to, any course or other education involving sports, games, or hobbies.
- Late or non-payment fees or finance charges; and
- Parking, permits, internet connectivity fees and student activities.

12. Is there a deadline for submission of my payment request for tuition reimbursement?

Yes. All requests and appropriate documentation must be submitted within 60 days after the term end date on your application for your request to be considered for reimbursement.

13. How do I track the status of my application/reimbursement request?

www.trackmystatus.com allows you to track the status of your application and payment requests. To access the site, you will need the unique 16-digit tracking number assigned to your application. You are also able to track the progress of your submission directly through the Trinity Health Tuition Reimbursement website: <https://myapps.microsoft.com> Once you access the Myapps link, you will route to the Edcor icon.

Note: You may contact Edcor at 1-844-344-2716 for assistance.

Additional Resources

- Contacts:
 - Edcor Contact Center:1-844-344-2716 (8:00 a.m. to 8:00 p.m. EST Monday – Friday)
 - <https://myapps.microsoft.com> Once you access the Myapps link, you will route to the Edcor icon.

Tuition Reimbursement Process Q & A

Services Available Through Our New Tuition Reimbursement Website	
Apply for tuition reimbursement and submit your payment request(s)	Trinity Health Tuition Reimbursement website: TrinityHealth.Tap.Edcor.com
Track the status of your application(s) and reimbursement payment requests	Visit the Track My Status website and enter your provided application number: TrackMyStatus.com
Questions	Call 1-844-344-2716 to speak with a Tuition Reimbursement Contact Center representative or use the website's live chat feature. Monday – Friday 8 a.m. to 5 p.m. ET.

1. What is tuition reimbursement?

Trinity Health is committed to supporting our colleagues' education and professional growth. We offer a tuition reimbursement benefit for eligible colleagues. Please see your Ministry's tuition reimbursement policy for details.

2. What is changing with the tuition reimbursement process?

Trinity Health is introducing an easier process for tuition reimbursement, effective June 22, 2020. On that date, we will collaborate with our new vendor, Edcor Data Services, for tuition reimbursement administration for colleagues in all Trinity Health ministries. Through Edcor, we now have a Trinity Health Tuition Reimbursement website: TrinityHealth.Tap.Edcor.com. This online system simplifies the tuition reimbursement process.

3. What are the benefits of the new process?

Our collaboration with Edcor makes it easier and more convenient for you to apply for and be reimbursed for your tuition. With our new Tuition Reimbursement website, you can easily:

- Apply for tuition reimbursement
- Upload grades and payment receipts
- Request reimbursement
- Track the status of your application and reimbursement requests

4. How do I use the new process to apply for tuition reimbursement?

Beginning June 22, 2020:

1. Visit our [Trinity Health Tuition Reimbursement website](https://TrinityHealth.Tap.Edcor.com).
2. Enter your Trinity Health credentials.

- User ID (Trinity Health Employee ID, which you can find beside your name on your profile when you log into Workday)
 - Password (your 5-digit home zip code)
3. After logging into the site for the first time, you will be required to change your password. If you do not have an email address on file, you will be required to enter one.
 4. Read and agree to the Edcor site's Terms and Conditions.
 5. Click on the blue button titled "Start a New Application Here" (near the upper left corner of the welcome page) OR click on the "New Application Request" button from the left navigation menu.
 6. Submit the appropriate information.
 7. Log into your Trinity Health Tuition Reimbursement account to submit your grades and payment receipts after the term ends.
 8. Track the status of your application(s) and reimbursement payment requests by logging into [the website](#) or by entering the provided application tracking number on TrackMyStatus.com.

5. I was previously approved for reimbursement for a course, but it hasn't ended yet. When the course finishes, should I submit my request for reimbursement to my ministry HR or through the Tuition Reimbursement website?

Please submit the request through the website. Your ministry's HR leader provided information about in-progress courses to Edcor so they are prepared to process these requests.

6. What information will I need to submit my application for tuition reimbursement?

The information you need to apply will be similar to what was required previously through your ministry's former process. You **may** need to provide the following:

- | | |
|--|--|
| • School Student ID | • Course Number(s) |
| • School/Educational Institution Name | • Course Name(s) |
| • School/Educational Institution Address | • Course Credit Hours |
| • Degree and Major | • Total Tuition Amount for Each Course |
| • Term Start and End Date | • Amount Anticipated Non-Repayable Financial Aid |

7. What type of paperwork do I need to submit with my reimbursement request?

You will need to submit the below information within 60 days after the term end date in ONE packet:

- Proof of passing grades (make sure the document has a school identifier on it, your name and course names, along with your grades)
- Itemized receipt indicating the difference between tuition and fees
- Proof of payment (must show that you paid the amount you are requesting reimbursement for)
- Method of payment (your documentation must show HOW you paid for your charges)

You can submit your paperwork via upload (preferred) on the website or fax. Instructions for both methods are located right on the screen for your convenience, but if you have questions, please reach out to the Tuition Reimbursement Contact Center for assistance.

8. Is there a deadline for submission of my application or reimbursement request?

Yes. Applications requests must be received no earlier than **120 days prior to the term (also known as semester) start date** and no later than **30 days after the term start date**. Note that a failure to submit your application request within this timeframe will result in a rejection.

For reimbursement, all appropriate documentation must be submitted within 60 days after the semester or term end date on your application for your request to be considered for reimbursement.

9. If I am participating in tuition reimbursement, may I apply for more than one course at a time?

Yes. You can apply for up to four classes or courses per application. This is strongly recommended if all of your courses are being taken during the same term.

10. How will I know when my application request is approved?

Edcor will check your application to ensure that it meets the various requirements of Trinity Health's policy and you will be notified via email of the final decision on your application.

11. Am I able to track the status of my application/reimbursement request?

Yes. The Trinity Health Tuition Reimbursement website has a special tracking website – [TrackMyStatus.com](https://www.trackmystatus.com) – that enables you to track the status of your application and payment requests. To access the site, you will need the unique 16-digit tracking number assigned to your application.

You can also track the progress of your application or request within your Trinity Health Tuition Reimbursement website account. If you need additional assistance, please call 1-844-344-2716 to speak with a Tuition Reimbursement representative between 8 a.m. and 8 p.m. ET Monday – Friday. You can also use the website's live chat feature.

12. How do I increase chance of my reimbursement being approved?

Follow these guidelines:

- The number one reason for rejections is missing paperwork. Read your program requirements and have access to all necessary documentation before starting your submission.
- Submit all your documentation at one time. Each packet needs to be complete.
- Use the upload feature on the website to submit files instead of the fax options. Fax machines can be unreliable.
- If uploading on the website (preferred method), please note the following:
 - Use dark, clean copies of your paperwork. Illegible documents cannot be processed.
 - Do not highlight anything on your documents.

- Make sure you upload the appropriate type of files. Follow the detailed instructions on the upload screen. Read these prior to uploading files.
- If you must use a fax machine, please note the following:
 - Use the provided cover sheet (available on the website). This ensures that YOUR paperwork accompanies YOUR application.
 - Use dark, clean copies of your paperwork. Illegible documents cannot be processed.
 - Do not highlight anything on your documents. When faxing, this will render your documents illegible.
 - Make sure you are faxing your documents in portrait mode and with standard 8.5" wide x 11" long papers.

13. How do I know if my school is accredited for tuition reimbursement?

Accreditation is a status granted to educational institutions found to either meet or exceed academic quality standards established by an accrediting agency through an assessment process. In accordance with the Trinity Health Tuition Assistance policy, all courses must be taken at a regionally or nationally accredited educational institution that is Title IV approved.

Schools listed on the Tuition Assistance website have been determined by the Department of Education to be accredited and are eligible for your program. If your school is not listed, or if you have questions about accreditation, contact your school directly or call the Tuition Reimbursement Contact Center at 1-844-344-2716 or use the website's live chat feature.

14. What expenses are and are not covered under the tuition reimbursement program?

Trinity Health will provide reimbursement for tuition, books (including taxes and shipping) and required course fees. For certifications, the following fees/costs are covered:

- Related preparatory courses and exam fees
- Enrollment fees
- Practice exams
- Workshops and bootcamps
- Study aids
- Study packages/products

15. Where can I view the tuition reimbursement policy for my Ministry?

All policies are located in Policy Tech. The link can be found on our local intranet page.

16. Is the tuition reimbursement amount changing with the new process?

No, your Health Ministry's tuition reimbursement details remain the same.

17. What if I have additional questions?

Please call the Tuition Reimbursement Contact Center at 1-844-344-2716 or use the website's live chat feature from 8 a.m. to 5 p.m. ET Monday – Friday, beginning June 22, 2020.