

TUITION REIMBURSEMENT PLAN FREQUENTLY ASKED QUESTIONS

INTRODUCTION

1. What is the Tuition Reimbursement Plan for Undergraduate Studies?

It's available for credit studies only from freshman through senior level courses. Reimbursement will be made for tuition (not fees) and the employee can only be reimbursed for part-time tuition (11 credits or less) at \$2,000 per calendar year.

*Please note: any remaining balance cannot be rolled over from year to year.

ELIGIBILITY

2. Who is eligible for this benefit?

Full-time benefits eligible faculty and staff who have worked for JHU for at least 120 consecutive days, and continue in a full-time benefits-eligible position can participate in the plan. The benefit is available only during periods in which the faculty or staff member is employed full-time, or during periods of authorized leave not exceeding one year in duration from which the faculty or staff member will return to full-time employment.

Retirees, Visiting Faculty and Staff, Residents, Interns and Postdoctoral Fellows, and family members are not eligible for this plan.

COVERAGE

3. Are there upfront/out-of-pocket costs that employees must pay?

Yes. Employees are required to pay all upfront tuition and fee costs, out-of-pocket, before the application will be approved.

*JHU will not reimburse for any received Pell Grants or scholarship funds applied to courses taken.

4. Are fees covered?

No. All university and college fees (including lab fees) are excluded from coverage and are the responsibility of the employee.

5. What defines part-time?

Eleven (11) credits or less are considered part-time studies.

6. Is there a grade requirement?

Employees are required to pass the course with a letter grade of "C" or better.

Pass/Fail or Satisfactory courses not accepted – letter grades only-no exceptions!

7. What does the plan not cover?

The plan does not cover:

- Costs exceeding \$2,000 per calendar year
- Non-credit courses, Certificate programs or Non-credit remedial courses
- Pass/fail/Satisfactory courses for which no academic credits are achieved/earned
- Audited courses
- Any related fees
- Courses offered by non-degree granting institutions
- JHU courses covered by the Tuition Remission plan
- Non-JHU course costs incurred by family members
- Graduate studies/ Dissertations
- Full-time studies (12 credits or more)
- No refund on Pell Grants/scholarship funds

8. Are special and degree credit courses covered?

The plan covers freshman through senior level undergraduate “special” and “degree” credit courses offered by an accredited, degree-granting institution. Employees will be expected to familiarize themselves with the admissions’ criteria for the college or university of their choice; some institutions require students to matriculate before they take any courses for credit.

9. How do I find out if the college/university I am interested in is a degree granting/accredited institution?

Accreditation and degree-granting status can be confirmed with the college or university’s Admissions’ Office. Employees may also contact the JHU Benefits Service Center at 410-516-2000 for this information.

APPLICATION PROCESS

10. What is the application process for participating in the Plan?

Employees are expected to register and pay tuition and related costs out-of-pocket. To qualify for reimbursement, employees must pass the course with a “C” grade or better (no pass/fail or satisfactory grades approved). We also need proof of tuition cost and proof of how the employee paid for the class. The process for requesting a reimbursement is outlined below. *JHU will not reimburse on any received Pell Grants/scholarship funds that apply to any course.

11. May employees participate in both Tuition Reimbursement plans?

No. An employee is eligible to participate in only one of the two plans. Employees living and working outside the Baltimore/Washington metropolitan area are eligible to participate **only** in the Reimbursement Plan for Faculty and Staff in Outlying Areas. Employees working within the Baltimore/Washington metropolitan area are eligible to participate in the Tuition Reimbursement Plan for Undergraduate Studies.

12. What is the process for employees who want to participate in both the Tuition Remission and Reimbursement plans?

Across the Remission and Reimbursement plans, the university maximum education benefit made available to employees is \$5,250 for credit course studies. Within the \$5,250 amount, a maximum of \$2,000 can be used on outside undergraduate courses covered through the Tuition Reimbursement Plan for Undergraduate Studies.

If your intentions are to use the \$2,000 available through the tuition reimbursement plan for undergraduate studies, and you plan also to participate in JHU courses during the same calendar year, you will need to limit family tuition remission spending on credit courses to \$3,250. If you plan only to participate in the Tuition Reimbursement Plan for Undergraduate Studies, your reimbursement amount still may not exceed \$2,000.

13. If I take and complete a course in the fall and submit for reimbursement (for \$1,500) in January, and take and complete a course (for \$1,500) in spring and submit for reimbursement in July of the same calendar year, will I be able to get reimbursement for both classes, the amount of which exceeds \$2,000?

No. The maximum reimbursement in one calendar year (January 1 – December 31) is \$2,000.00. Although the courses were taken in two separate calendar years, **it is when the reimbursement is processed through payroll that would determine the annual limit.**

14. Can any unused portion of the \$2,000 be carried forward to the next calendar year?

No, any unused benefit may not be applied to subsequent years.

FORMS

15. Where can I find the forms?

Employees may download the form from the JHU Benefits website under forms.
<http://www.benefits.jhu.edu/index.cfm>

SEEKING REIMBURSEMENT

16. What paperwork does an employee need to submit to obtain reimbursement of the undergraduate tuition costs?

To obtain reimbursement for undergraduate tuition costs paid out-of-pocket, employees must: 1) provide the completed tuition reimbursement form; 2) obtain and provide a letter grade report (no pass/fail or satisfactory); and 3) obtain and provide the institution's payment confirmation that includes tuition costs.

17. Can I get reimbursement if I am considered to be a full-time student by my college even though I am registered for fewer than 12 credits?

Yes.

18. Where should completed forms be sent?

Completed forms will be processed by the JHU Benefits Service Center:
1101 E. 33rd Street, Suite D200, Baltimore, Maryland, 21218.
By Fax: 443-997-5820 or E-mail: benefits@jhu.edu

19. Is there a deadline for submitting the application to seek reimbursement?

Yes. Employees are expected to have submitted their paperwork to the JHU Benefits Service Center within 12 months of course completion.

20. Will the staff member be reimbursed if he or she terminates from the university before completing the course?

If the employee has not met the \$2,000 threshold, the employee will be reimbursed up to that amount if the course start date preceded the employee's termination date. Employees will not be reimbursed for courses that started after their termination date.

SUPERVISORY INVOLVEMENT/PARTICIPATION

21. Does an employee desiring to participate in the plan have to obtain their supervisor's approval?

Yes. Supervisor certification is needed to confirm an employee's status (length of employment). It must also be obtained for courses held during employees' work hours and by new employees requesting a waiver of the 120 consecutive days of full-time employment requirement. Supervisors may waive the 120-day requirement only for courses that improve employees' ability to do their jobs.

TAXABILITY/WITHHOLDING ISSUES

22. Is the benefit received through the Tuition Reimbursement Plan for Undergraduate Studies taxable?

No. The plan is not taxable due to the IRS annual allowance of \$2,000.

CONTACT INFORMATION

23. Where can I find information on the plan?

The JHU Benefits website <http://www.benefits.jhu.edu/index.cfm>

Tuition Benefits are subject to change.

24. If employees want additional information, who should they call?

Employees should call the JHU Benefits Service Center 410-516-2000 to obtain information about any of the tuition assistance benefit plans.