Enhanced Tuition Benefits FAQ

Benefit Overview
1. **What are the eligible programs and benefit amounts?**
   Effective for the Fall 2022 Semester, the following tuition benefits will be available to eligible employees:

<table>
<thead>
<tr>
<th>Education Program</th>
<th>Eligibility Criteria</th>
<th>Annual Benefit Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate’s Degree</td>
<td>Includes all courses taken as part of an approved degree program, as well as prior learning assessments and tests used to document knowledge for the purpose of granting credit toward an approved degree (e.g. - CLEP, ACE, DANTES). Degrees can be obtained at any regionally accredited university.</td>
<td>$5,250</td>
</tr>
<tr>
<td>Bachelor’s Degree</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master’s Degree, PhD, Doctorate, EMBA</td>
<td>Includes all graduate level coursework taken as part of an approved graduate degree. Degrees can be obtained at JHU or at any other regionally accredited university.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Individual Courses outside of JHU</td>
<td>Each course must be directly related to an employee’s current position or career path that aligns with JHU’s business needs.</td>
<td>$5,250</td>
</tr>
<tr>
<td>(Bargaining Unit Members only)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Credit Classes at JHU</td>
<td>Part-time noncredit courses offered through the continuing education unit of one of JHU’s academic divisions.</td>
<td>2 classes per year (effective Calendar Year 2023)</td>
</tr>
<tr>
<td>Non-Degree seeking Credit Classes at JHU</td>
<td>Part-time credit courses offered through one of JHU’s academic divisions.</td>
<td></td>
</tr>
</tbody>
</table>

Annual benefit amount is based on the calendar year in which the course starts. Any remaining balance cannot be rolled over from year to year.

Any reimbursement already received in 2022 will count towards the new annual maximums. You must submit for reimbursement for Spring/Summer 2022 to the Benefits Service Center by August 1, 2022.

**ELIGIBILITY**
2. **Who is eligible for this benefit?**

   Full-time benefits-eligible faculty or staff member who has been employed by JHU for 120 days or more, and continues in a full-time position.

   Full-time benefits-eligible bargaining unit member, who has completed 90 calendar days of full-time employment and continues in a full-time position.

   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.

Must be degree-seeking.

**Coverage**

3. **What expenses are eligible?**
   Eligible expenses include tuition and course-related fees. Eligible expenses will be covered up to the annual benefit amount for the calendar year in which the course starts.

4. **What expenses are not eligible?**
   Employees are responsible for all ineligible expenses including, but are not limited to: books, non-course related fees, meals, lodging, transportation, and tools or supplies that can be kept after completing the course of instruction.

5. **What programs are not covered?**
   Educational programs not covered include, but are not limited to:
   - Individual courses for sports, recreation or hobbies, unless part of a degree program.
   - Non-credit bearing certificates
   - Non-credit bearing individual courses (does not apply to Bargaining Unit Members)
   - Certification, designation, and license exams.
   - Seminars, conferences, and workshops.

6. **Are there approved education providers?**
   All courses related to a degree program must be provided by an institution holding Regional accreditation.
   All courses taken by Bargaining Unit Members must be provided by an accredited institution recognized by the U.S. Department of Education.
   School accreditation can be verified via the [U.S. Department of Education (USDE)](https://www2.ed.gov) website.

7. **What are the course completion requirements?**
   All courses related to a degree must be completed with a minimum grade equivalent of C or better. Courses taken by Bargaining Unit Members that are based on a pass/fail grading system must be completed with a passing grade.

   Courses in which an employee receives an incomplete, withdrawal, or equivalent grade are ineligible.

**Application and Approval Process**

8. **How do I apply for tuition assistance for an undergraduate or graduate degree?**
   To be eligible to receive tuition assistance, an employee must submit a course approval application for each quarter, semester or academic term. Applications will be reviewed for policy compliance by the program administrator before forwarding the application to the employee’s immediate supervisor and HR Business Partner for approval.

   JHU will be partnering with Bright Horizons/EdAssist to help administer this benefit. Please check back for
**Payment Process:**

9. How does the payment or reimbursement process work?

**Undergraduate benefits** – Beginning with Spring Semester 2023, undergraduate benefits will be administered as a pre-payment. JHU’s administrator, Bright Horizons/EdAssist, will make the payment directly to the school on your behalf. You will then be responsible for any remaining balance or expenses that are not covered by the tuition plan.

Upon application approval, the employee will receive a Letter of Credit to present to his/her school at the time of course registration. The school will submit an itemized invoice of tuition and fees to EdAssist. EdAssist will process payment to the educational provider for eligible tuition and fees on behalf of JHU.

For the Fall 2022 semester, you will submit your request for reimbursement to EdAssist before the end of the semester. Please check back for more details on how to submit for your reimbursement.

**Graduate benefits** – Graduate degrees outside of JHU will be administered as a reimbursement to the employee. Reimbursement will occur after the course is complete and a passing grade is submitted.

**Graduate benefits at JHU** - For employees participating in the Tuition Remission program and pursuing their degree at JHU, the employee will submit an itemized invoice of tuition and fees to EdAssist upon application approval. Payment will be handled through the registrars.

For all programs, the employee is responsible for submitting proof of successful course completion (grades) within 60 days after course completion to close out the application.

10. What is the deadline to submit for reimbursement for Spring/Summer 2022 classes?

   If you are currently participating in the tuition reimbursement program, you will need to submit all reimbursement requests by August 1st to the Benefits Service Center.

11. What happens if a passing grade is not submitted and a payment was already made?

   Repayment of tuition and related expenses will be required for any course in which the employee fails to meet the policy course completion requirements. JHU benefits will work with the employee to repay any amounts.

**Tax Implications**

12. Are my benefits taxable?

   In compliance with IRS regulations (section 127), employer provided educational assistance is exempt from taxation up to a maximum of $5,250 per calendar year. Taxes will be assessed if, at the time of payment processing, the total amount of tuition assistance paid in the calendar year exceeds $5,250. Taxes will be deducted from your reimbursement and you will receive the net cost. Please consult with your tax advisor for additional information.

   Tuition remission used by your spouse/or dependent children for graduate courses, is considered taxable income and will be withheld from your paycheck.
Tuition remission used by your domestic partner and their dependent children, is considered taxable income and will be withheld from your paycheck.

**Contact Information:**
JHU Benefits Service Center at 410-516-2000 or Benefits@jhu.edu