

UnityPoint Health

Education Assistance Program

PROGRAM PURPOSE

UnityPoint Health offers tuition assistance to eligible Team Members who seek to pursue education that supports the current business needs and future objectives of the organization. Although attainment of educational goals often leads to improved performance and new career opportunities, participation in this program does not guarantee a specific career result such as a promotion or salary increase. UnityPoint Health reserves the right to terminate or amend this policy at its sole discretion.

TEAM MEMBER ELIGIBILITY

Team Members must meet the following criteria at the time of application approval and payment processing.

- Must be an Active Employed Team Member scheduled to work at least 32 hours per pay period
- Employed Team Members will be eligible after 6 months of employment
- Employed Team Members must be in Good Standing and have not had a formal written performance corrective action plan within the previous 12 months

NOTE: Team members that are part of the Dubuque SEIU Local 199 Union are not eligible to participate in this Education Assistance Program. Team members should reference their collective bargaining agreement for more information.

UnityPoint Health – Meriter Team Members are not eligible to participate in this program and should reference their Tuition Assistance Program Policy.

ELIGIBLE PROGRAMS AND BENEFIT AMOUNTS

All educational programs must be related to the Team Member's current job or an established career path within UnityPoint Health. Eligible degree types and learning opportunities are listed in the table below with the annual benefit amounts based on a Team Member's employment status at the time of payment processing.

Eligible expenses include tuition, required textbooks, and mandatory course-related fees such as registration or admissions fees, lab fees, technology fees, library cards, and graduation fees.

Team Members are responsible for all ineligible expenses including, but are not limited to meals, lodging, transportation and tools or supplies (other than textbooks) that can be kept after completing the course of instruction.

Eligible expenses will be covered up to the annual benefit amount for the calendar year in which the course ends. Payment amounts are based on the Team Member's Full-Time/Part-Time status at the time of payment processing.

Education Program	Eligibility Criteria	Annual Benefit Amount
Associate Degree Bachelor's Degree Master's Degree Doctorate / PhD MBA / EMBA JD	Includes all undergraduate / graduate level coursework required to complete an approved degree. Courses should result in a final grade (letter grade or pass/fail).	<u>Full-Time Team Members</u> (64-80 hours / pay period): \$5,250 / Year <u>Part-Time Team Members</u> (32-63 hours / pay period): \$2,625 / Year
Certificate (For-Credit Only)	Includes all courses required to complete an approved Certificate program in an approved area of study. Courses must have a measurable completion requirement such as a final grade (letter grade or pass/fail) and must result in academic credit.	
Certifications	Includes prep courses, materials, exams, re-certifications and CEUs required to maintain or renew certification, in an approved area of study. Payment for prep courses and materials will be eligible only after evidence of passed exam. Learning requirements for recertification (CEUs) will be eligible with evidence of certification renewal.	
Assessments	Prior Learning Assessments (PLA) and tests used to document knowledge for the purpose of granting credit toward an approved degree (e.g. - CLEP, ACE, DANTES).	

UnityPoint Health may, from time to time, update the list of certifications that are eligible for reimbursement through the EdAssist portal. The process is outlined below:

- Requestor completes the “Request for a Review of a National Certification for Tuition Reimbursement Eligibility” form which includes obtaining a signature from their Executive Director.
- Request is presented to Human Resources leadership for review and approval.
- If approved, certification is added as an approved qualification through EdAssist’s platform.

Note, while requests for Certification expansion may be submitted throughout the year, only approved programs showing as available in the EdAssist platform may be pursued.

Educational programs not covered include, but are not limited to:

- Individual courses for sports, recreation, or hobbies, unless part of a degree program.
- Seminars, conferences, and workshops.

APPROVABLE EDUCATION PROVIDERS

All degree/certificate programs and individual course providers *must* be provided by an institution holding Regional or National accreditation recognized by the U.S. Department of Education. School accreditation can be verified via the [U.S. Department of Education \(USDE\)](https://www.ed.gov/programs/usde) website.

All certification/designation providers must be provided by a professional association, certifying body, or institution authorized to award the industry accepted certification/designation.

COURSE COMPLETION REQUIREMENTS

All courses related to a degree or certificate program must be completed with a minimum grade equivalent of C or better and award college credit. Courses that are based on a pass/fail grading system must be completed with a passing grade. Courses in which a Team Member receives an incomplete, withdrawal, or equivalent grade are ineligible.

Courses will only be reimbursed once. If you are unhappy with your grade and choose to retake it, it is ineligible for reimbursement.

Certifications/Designation exams must be passed at a level eligible to earn the industry accepted certification/designation. Expenses related to preparatory materials and examinations will only be eligible for reimbursement after successfully obtaining the Certification/Designation qualification.

COACHING & ADVISORY SUPPORT

EdAssist offers core coaching support to all eligible U.S. Team Members, including policy expert, academic, and financial wellness coaching. Coaches provide more details on programs and institutions and can help identify career-relevant and best-fit options. Team Members are strongly encouraged to complete an appointment with an EdAssist academic coach before submitting their first application for a new educational program. To schedule a coaching appointment, use the self-scheduler option available under "Coaching & Resources" on the EdAssist website.

APPLICATION SUBMISSION AND APPROVAL

To be eligible to receive education assistance, a Team Member must submit a course approval application for each quarter, semester, or academic term. Applications should be submitted prior to the course start date. Applications will not be accepted more than 90 days prior to course start date or after 30 days beyond the course start date. Applications will be reviewed for policy compliance by the program administrator before forwarding the application to the Team Member's immediate manager for final approval.

PAYMENT PROCESS

The Team Member makes all required payments directly to the educational provider. UnityPoint Health reimburses the Team Member for eligible expenses upon successful completion of the course.

The Team Member must submit both the following within 60 days of course completion to receive reimbursement:

- Appropriate evidence of successful completion (i.e., grades, CEUs, certificate of successful completion, etc.)
- An itemized invoice of tuition and fees with proof of payment
- NOTE: Textbooks can be included in the total application cost for traditional reimbursement. No separate application is required.

The Team Member is required to fulfill all course completion requirements and to submit proof of grades, payment, etc. within the same 60 days after course completion.

OTHER SOURCES OF FINANCIAL ASSISTANCE

Team Members receiving educational grants, scholarships, military benefits, or discounts must disclose all such financial assistance and provide documentation of how the funds were applied. Funds received from such sources will be deducted first from any expenses not covered under the program. Any remaining funds received will be deducted from eligible tuition and fees. Financial Aid received in the form of student loans will not be deducted.

TAX IMPLICATIONS

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. Please consult with your tax advisor for additional information.

WORK COMMITMENT

A Team Member who voluntarily terminates employment or is terminated for cause within 12 months of receiving education assistance will be required to refund UnityPoint Health 100% of the payments received within that time period on a pro-rated basis from the time of last payment and date of termination.

Team Members are exempt from the work commitment if their employment is involuntarily terminated for reasons other than cause or performance.