

## Table of Contents

Benefit Purpose.....	2
About My Benefit .....	2
How Can I Get Started? .....	2
Coaching.....	2
Network.....	2
Eligibility and Using My Benefits.....	3
What Are the Eligibility Requirements? .....	3
What Degrees or Education Programs Are Eligible? .....	3
What Majors or Fields of Study Can I Pursue? .....	3
What Schools or Providers Can I Attend?.....	4
What Expenses and Fees Are Covered?.....	4
How Much Can I Spend?.....	5
When Do I Need to Submit My Application?.....	5
Does My Manager/Supervisor Need to Approve My Application?.....	5
What if My Manager/Supervisor is Unable to Approve My Application?.....	5
How Do I Check the Status of My Application? .....	5
What if my Application is Denied? .....	5
Is There a Minimum Grade Requirement? .....	5
How Do I Get Reimbursed? .....	5
Will I Be Taxed?.....	6
Would I Ever Need to Repay?.....	6

## Benefit Purpose

UnityPoint Health offers *EdAssist by Bright Horizons*® to eligible Team Members pursuing education that supports the current business needs and future objectives of the Company.

## About My Benefit

UnityPoint Health has partnered with EdAssist to administer the Education Assistance Program. This partnership brings the following enhancements:

- A simple web-based approach to applying for and receiving tuition assistance, as well as submitting program and course requests, grades, and receipts
- Educational & college finance coaching at no cost to you
- Exclusive tuition discounts and other savings at 220+ schools

If your question is not answered below, you can contact EdAssist by submitting a support ticket within the EdAssist site. Or, to get real-time answers, you can connect directly with our support team via Live Chat on the website!

### How Can I Get Started?

You can log into EdAssist at <https://unitypoint.edassist.com> to apply, view resources regarding your tuition benefit, schedule a coaching session, or submit a support ticket.

### Coaching

Academic and financial wellness coaches will help you:

- Find the right school, program, degree, or course to meet your educational and career objectives
- Compare different programs, majors, or degrees to help save you time and money
- Evaluate previous coursework and prior learning to maximize your transferable credits
- Navigate the admissions and college finance processes

Schedule your **free** appointment by visiting the *Education Coaching* page within EdAssist.

### Network

The EdAssist Education Network is a group of more than 220 schools and education providers that offer unique benefits to you as a Team Member of UnityPoint Health. Benefits vary from school to school but may include:

- Tuition discounts
- Waived application fees
- A dedicated contact for students

While these benefits are primarily focused on working professionals, some schools also extend discounts on select programs to immediate family members. To learn more, select *View Discounts from Eligible Schools* from the Home page of EdAssist.

## Eligibility and Using My Benefits

### What Are the Eligibility Requirements?

You must meet the following criteria at the time of application approval and payment processing to be eligible for the benefit:

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

Team Members that are part of the Dubuque SEIU Local 199 Union are not eligible to participate in this program and 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.

### What Degrees or Education Programs Are Eligible?

All education programs must be related to the Team Member's current job or an established career path within UnityPoint Health . All coursework must result in academic credit. Continuing Education Units (CEUs) are eligible if they are granted for achieving a certificate or certification.

Educational programs that are covered include:

- Master's Degree
- Doctorate Degree
- Bachelor's Degree
- Associate Degree
- Certificate (must have measurable course completion requirement beyond attendance/participation)
- Individual Courses

Education programs that are 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

### What Majors or Fields of Study Can I Pursue?

Eligible Fields of Study should relate to your established career path within UnityPoint Health.

Majors or Fields of Study that are covered include, but are not limited to:

- Accounting
- Business Administration
- Finance
- Information Technology
- Management
- Nursing

If you don't see your Field of Study (or one that is similar) already listed in the system, you can select "Other" and fill it in.

### What Schools or Providers Can I Attend?

All coursework must be provided by an institution holding Regional or National accreditation. You can determine if your school or provider holds Regional or National accreditation by searching the U.S. Department of Education's website: <http://ope.ed.gov/accreditation/>. Certifications/Designations must be provided by a professional association, certifying body, or institution authorized to award the industry-accepted certification/designation.

The list of Regional Accrediting Agencies listed below is subject to change without notice:

- **MSA:** Middle States Association of Colleges and Schools
- **MSCHE:** Middle States Commission on Higher Education
- **NCA:** North Central Association of Colleges and Schools
- **NEASC:** New England Association of Schools and Colleges
- **NEASC-CTCI:** New England Association of Schools and Colleges and Committee of Technical and Career Institutions
- **NWCCU:** Northwest Commission on Colleges and Universities
- **OSRHE:** Oklahoma State Regents for Higher Education
- **SACS:** Southern Association of Colleges and Schools
- **WASC:** Western Association of Schools and Colleges
- **WASC-ACCJC:** Western Association of Schools and Colleges and Accrediting Commission for Community and Junior Colleges

The list of National Accrediting Agencies listed below is subject to change without notice:

- **AABI:** Aviation Accreditation Board International
- **AARTS:** Association of Advanced Rabbinical and Talmudic Schools
- **ABHE:** Association of Biblical Higher Education
- **ACBSP:** Accreditation Council for Business Schools and Programs
- **ACCSCT:** Accrediting Commission of Career Schools and Colleges
- **COE:** Council on Occupational Education
- **DETC:** Distance Education and Training Council

Providers holding specialized accreditation are also eligible under the program.

### What Expenses and Fees Are Covered?

Eligible expenses include:

- Tuition
- Books
- Course related fees

Your tuition and eligible expenses will be paid at 100% up to your annual benefit amount.

Team Members are responsible for all ineligible expenses including, but not limited to:

- Meals
- Lodging
- Transportation

- Tools, materials, or supplies (other than textbooks) that can be kept after completing the course of instruction

### How Much Can I Spend?

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 your FT/PT status at the time of payment processing.

Status	Annual Benefit Amount
Full Time	\$5,250
Part Time	\$2,625

Your annual benefit amount is pro-rated based on your standard hours worked per pay period.

### When Do I Need to Submit My Application?

Applications should be submitted up to 90 days before the course start. Applications will not be accepted later than 30 days after the course start date.

### Does My Manager/Supervisor Need to Approve My Application?

Yes. Your application will be reviewed for program compliance by EdAssist and then forwarded to your immediate supervisor for final approval.

### What if My Manager/Supervisor is Unable to Approve My Application?

If your manager/supervisor is unable to approve due to being on leave, extended vacation, etc., you can contact AskHR to have your profile updated within EdAssist. If your manager/supervisor is unable to approve due to technical issues or needs his or her password reset, your manager should contact EdAssist for assistance.

### How Do I Check the Status of My Application?

You can check the status of your application at any time by logging into EdAssist. You will also receive email notifications when your application status changes; please make sure your email address in your EdAssist profile is current.

### What if my Application is Denied?

Your benefit was designed to enforce your Education Assistance Program. If your application is denied, you'll receive an email that includes the reason for denial.

### Is There a Minimum Grade Requirement?

All coursework must be completed with a minimum grade equivalent of C or better. 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.

### How Do I Get Reimbursed?

Upon application approval, you are responsible to make all required payments directly to your school and will be reimbursed for eligible expenses upon successful course completion. You must submit proof of successful course completion (grades) and an itemized invoice of tuition and fees within 60 days after course completion in order to receive reimbursement.

You will receive an automated email notification when your application is processed for payment, and you should receive your payment via payroll within 1-2 pay periods.

**Will I Be Taxed?**

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. Amounts over \$5,250 may be exempt from taxation if the education qualifies as work-related education (section 132). Taxes will be assessed for non-qualifying work-related education if, at the time of payment processing, the Team Member's total amount of tuition assistance paid in the calendar year exceeds \$5,250. Please consult with your tax advisor for additional information.

**Would I Ever Need to Repay?**

Any Team Member who voluntarily terminates employment 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.