Houston Methodist Tuition Assistance Program

Frequently Asked Questions

You will find that many, if not all, of your questions about the Houston Methodist Tuition Assistance Program are addressed here and in the Tuition Assistance Policy [HR 45]. If you still have questions after reviewing these materials, please contact a Bright Horizons customer service representative (866) 537-2235 or via a support ticket on the Bright Horizons EdAssist Solution website.

1. What is the Tuition Assistance Program?

Houston Methodist is committed to maintaining and developing the overall knowledge of our workforce by providing financial assistance to employees who pursue undergraduate, graduate and doctoral level courses.

This program provides reimbursement to you upon successful completion of your course(s). You must pay for and successfully complete the course. Grades and Proof of Payment are then submitted to EdAssist and you are reimbursed for the eligible expenses.

The Tuition Assistance Program also provides a direct bill option. Instead of paying for approved courses out of your own pocket and requesting reimbursement at the end of the term, you will ask your school to bill EdAssist, the program administrator. This Direct Bill program will make paying for your college easier! We encourage you to submit your application to Bright Horizons prior to your enrollment in a given course.

For direct bill participants, a separate book reimbursement will also be available to allow for book reimbursements to employees, once an application has been approved and the coursework has been completed.

2. Who administers The Houston Methodist Tuition Assistance Program?

The Houston Methodist Tuition Assistance Program is administered by Bright Horizons. Bright Horizons is your single point of contact for assisting you in managing your tuition benefits.
3. How can I reach Bright Horizons?
   **Website:** houstonmethodist.edassist.com/

   You are able to submit and check the status of your applications, upload and submit documentation and view payment information 24 hours a day, 7 days a week via the tuition assistance website.

   Log on using your Houston Methodist employee ID. This seven digit number is your unique identifier and can be found by viewing your record in API LaborWorkx or by logging into MARS. If you are a first time user or you have forgotten your password, click on “Login Help” and enter your Houston Methodist email address to receive your password reset information.

   You can reach a customer care representative 7 a.m. – 7 p.m. Central Time, Monday through Friday, via the following contact methods:

   **Support:** Log in to Bright Horizons EdAssist Solutions and select “Support” from the top menu to submit a support ticket.

   **Phone:** 866.537.2235
   Customer service representatives are available between the hours of 7 a.m. and 7 p.m.

4. Who is eligible to participate in the Tuition Assistance Program?

   Employees with standard hours of 20 or more per week and who are not classified as Temporary or PRN can participate in the tuition assistance program. Employees are eligible for benefits if the following criteria are met:

   - An employee must be actively at work or on medical leave of absence or family medical leave of absence (in an eligible status code with standard hours of at least 20 per week and not classified as Temporary or PRN) at the time of the class start date, application approval, and completion of the course(s). Employees who are on any other type of leave are ineligible.
   - Employees must be in an active status at the time tuition assistance is processed. Employees who are on medical leave of absence or family medical leave of absence will be eligible to receive tuition assistance once they have returned to work. Documents for completed courses must be submitted to Bright Horizons EdAssist Solutions within 90 days of return to work from leave of absence.
   - An employee in an eligible status at the beginning of the class who changes to another eligible status within the duration of the class will be reimbursed based on their status at payment submission.
Direct Bill: To be eligible for the direct bill option, employees must meet the criteria above and also have been employed by Houston Methodist for the prior six months and be in a benefits eligible position at the time of the application and payout.

5. What happens if I change positions or become ineligible?

Repayment of tuition and related expenses will be required for any course in which the employee fails to meet the policy course completion requirements.

An employee in an eligible status at the beginning of a class who changes to another eligible status within the duration of the class will be reimbursed according to the maximum reimbursement level of the status he was in more than half the duration of the class. If you change to an ineligible status, you will not receive reimbursement.

6. Do I need to submit an application before enrolling in a course/program?

There are different deadlines, based on the program you choose.

**Traditional Reimbursement:**

Applications should be submitted two weeks, but no more than 60 days, prior to the start of class. Applications submitted more than 90 days after the class has finished will not be approved.

Employees who are on medical leave of absence or family medical leave of absence will be eligible to receive tuition reimbursement once they have returned to work. Documents for completed courses must be submitted to EdAssist within 90 days of return to work from leave of absence.

**Direct Bill:**

To be eligible for funding consideration, an employee must submit a course approval application via the tuition assistance program website prior to each term. Applications will be reviewed to ensure compliance with all program policies and to ensure the employee has funds available for the appropriate benefit period. For this reason, applications should be submitted at least 2 weeks, but no more than 60 days, prior to each semester, term or unique course start date. We encourage employees to submit the application before the beginning of the class to ensure that it is approved.

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 Houston Methodist.
Once an application has been approved and the coursework has been completed, the employee can apply for reimbursement of book expenses. In order for expenses to be eligible for reimbursement, all required documents must be submitted within 90 days from course end date. After this date, Houston Methodist will no longer provide payment regardless of application approval.

To ensure your educational provider, degree program and field of study are eligible for participation in the Tuition Assistance Program, you are encouraged to submit applications via the tuition website at HoustonMethodist.edassist.com, prior to your course begin date.

7. What is a Letter of Credit (LOC)?

A Letter of Credit (LOC) acts as money for registration and enrollment in courses and programs. Participating schools will allow you to register with a Letter of Credit instead of payment. This one-time use document is only valid for the course(s) indicated.

8. How Does My School Get Paid (Direct Bill)?

Upon application approval, you will receive an LOC, which you’ll need to sign and submit to your provider’s billing office. Your school or provider will then bill Bright Horizons, and they’ll pay your school or provider directly. You are responsible for submitting proof of successful course completion (grades) within 90 days after course completion in order to close your application.

9. What educational programs are covered?

Eligible Degree Programs:
- Associate
- Bachelor
- Masters
- Doctorate
- Individual Courses – must follow the same field of study rule as an entire degree.

Eligible Fields of Study:

To qualify for tuition assistance, the program/course must relate to the business of Houston Methodist and must not interfere with your regular job nor detract from your job performance. When the program is approved, all courses required to complete that program (core and electives) will be covered.

10. What educational programs are NOT covered?

Excluded Degree Programs:
- Individual courses not related to the business of Houston Methodist
- Certifications
- Prep courses
- Degree program entrance exams (e.g., SAT, ACT, GRE, LSAT, GMAT, MCAT)

**Excluded Fields of Study:**
- Programs considered hobbies or personal interest
- Certification expenses are not eligible for reimbursement under the tuition reimbursement program but may be paid from the departmental budget if managers believe such certifications will contribute to meeting departmental goals.
- Licensure expenses are not eligible for reimbursement under the tuition reimbursement program or any other policy. Employees are responsible for payment of their licenses in order to keep them current.

11. **What are the eligible educational providers?**

Qualified degree programs must be related to the business of Houston Methodist and must be provided by an accredited institution as defined by the Department of Education.

The school can hold any accreditation listed on the Office of Post Secondary Education College Search Tool.

You can verify a school's accreditation by:
- Using the [Office of Post Secondary Education College Search Tool](#),
- Checking the school’s web site to verify accreditation, or
- Calling the school and asking for the name of their accrediting agency

12. **What is the Enhanced Education Network (EEN)?**

Bright Horizons has established a network of colleges and universities to increase the value of your tuition assistance dollars. Essentially, each institution has agreed to provide a discount and/or other meaningful benefit to each of Bright Horizon's client companies. The list of institutions participating in the Bright Horizons FPN program is available on the program website.

13. **What if I can't find my school or school location using “Search for Provider” on Step 2 of the online application?**

If you are unable to find your school using the “Search for Provider” tool on Step 2 of
the online application, please contact Bright Horizons via a support ticket under the Support tab on the top navigation bar or (866) 537-2235 for assistance. If the school meets the policy guidelines for accreditation, your school will be added to the list of eligible educational providers. If you can find your school but cannot find your school location, please select the nearest location.

14. **What expenses and fees are covered?**

Expenses that will be reimbursed include, but are not limited to:

- tuition costs including Thesis/Doctoral costs
- matriculation fees
- registration fees
- lab fees
- graduation fees
- computer center fees
- library fees
- general usage fees
- textbooks (book costs should be included on the tuition reimbursement application)

15. **What expenses and fees are NOT covered?**

Expenses that will not be reimbursed include, but are not limited to:

- supplies and equipment
- finance and deferred payment charges
- late registration fees
- add/drop fees
- penalties
- identification card
- health fees
- insurance fees
- recreational center fees
- transportation to and from class
- parking expenses
- Certification, licensure, prep course and exam fees.

16. **Does my manager need to approve my coursework?**

Yes, your direct manager will be asked to provide final approval of all applications submitted. Bright Horizons will initially review the application to ensure it meets the Houston Methodist Tuition Assistance Policy guidelines. Managers are responsible for:
• Reviewing approval applications via the tuition reimbursement website upon receipt of the notification email.
• Obtaining funding approval from the executive responsible for employee’s department.

Managers may base approval or denial of applications on the following criteria:
• Interference with an employee’s regular job or job performance
• Relationship of the degree program to the business of Houston Methodist.
• Departmental budgetary constraints (pertains to The Methodist Hospital Physician Organization and the Houston Methodist Research Institute)

You will receive an email notification of your manager’s approval or denial of your application.

17. **Is there a maximum benefit amount?**

Covered expenses will be counted toward the annual cap limit based on the year in which the course(s) begins. Houston Methodist will cover 100% of tuition, books and eligible fees for courses related to a qualified degree program, subject to an annual limit of:
• $4,000 for employees with standard hours of 32+ per week who are not classified as temporary or PRN.
• $2,000 for employees with standard hours of 20-31 per week who are not classified as temporary or PRN.

18. **Is there a minimum grade requirement?**

Upon completion of your course you must submit a copy of your official grade report/transcript to EdAssist within 90 days of your course end date.

To be eligible to receive reimbursement:
• C (C- minus is not acceptable) or better for all graded courses
• A “pass” will be accepted from courses offering only a pass/fail grading option.

Grades should be submitted using the upload feature on the tuition website HoustonMethodist.edassist.com.

19. **When would I need to make a repayment?**

**Reimbursement:** You will not be asked to repay tuition amounts. If a course was not successfully completed, reimbursement will not be issued.
Direct Bill: Repayment of tuition and related expenses will be required for any course in which the employee fails to meet the grade requirement and the policy course completion requirements. Participants in the program will be prevented from submitting any new applications or receiving reimbursement on an approved application until such matters have been resolved with Houston Methodist.

All Participants: Employees who voluntarily resign their employment or who are terminated for cause within twelve months of submitting for tuition assistance are required to repay any and all reimbursed tuition expenses. This repayment obligation covers any and all costs and tuition expenses reimbursed by Houston Methodist to the employee during the twelve-month period prior to the employee’s resignation/termination for cause subject to the repayment provision of this policy.

20. Is there a stay or work requirement?

There is a twelve-month period work commitment or stay requirement associated with the use of the tuition assistance benefit.

21. Are my tuition reimbursements taxable?

Taxation of employer-provided education reimbursement is governed by Internal Revenue Code Section 127, which exempts from taxation, education reimbursement payments up to a maximum of $5,250 for each associate per calendar year. Amounts over $5,250 will be taxed.

With the maximum annual cap limit possible in a given year being $4,000, the full amount is considered exempt from taxation. However, some of your reimbursement will be taxable if you are paid in the current calendar year for tuition expenses for both the prior and current years, and your total reimbursement received in the current year exceeds $5,250. The payment amount in excess of $5,250 will be listed on your paycheck stub as Imputed Tuition Reimbursement, and the tax on this amount will be deducted from your tuition reimbursement payment.

22. How do I submit an application using the tuition website?

To log in to the website, your default user name is your seven-digit Houston Methodist Employee ID and the password you setup and then follow the steps below. There are five steps to submitting an application for review:

1. Contact Information
   • Confirm/select your address.
• Confirm/select your telephone number.
• Confirm/select your email address.

2. Program Information
• Select your program.
• Enter/review educational provider information.
• Enter/review education program and field of study.

3. Course Information
• Enter your educational objectives and specific term information.
• Enter your course details.
• Enter expenses covered per the policy.

4. Agreements
• Enter any financial aid you are receiving (if applicable).
• Read and agree to the agreements.
• Type your name exactly as it appears on the screen.

5. Review & Submit
• Confirm that all information entered is complete and accurate, or edit as needed.
• Submit your applications.

Bright Horizons will review your application for compliance to your company’s tuition assistance policy. If further information is needed, you will be contacted via email requesting the required information.

23. How do I find out if my application has been approved?

You will receive an approval notification via email. We also encourage you to monitor the status of your application online at [HoustonMethodist.edassist.com](http://HoustonMethodist.edassist.com), or through the IVR at 866.537.2235.

24. How do I request reimbursement for my course/term charges?

Within 90 days of your course end date, the following documentation must be submitted:
• Copy of grade report/transcript that includes:
  o Student name
  o School name
  o Course name
  o Grade received
• Statement of charges for your course/term that includes:
  o Student name
  o School name
  o Course name or term (information that shows when/what the changes are for)
  o Tuition amounts
- Itemized list of specific charged
- Shows associated charges have been paid for in full
- If paid using financial aid, must list the type of financial aid received

Bright Horizons will process your tuition reimbursement application within five days of receipt of the above documentation, and you will be sent an email notification that your application has been processed. Once you have been notified of payment approval, Houston Methodist will process your payment in the off cycle payroll on the Monday following the biweekly payroll, and pay via direct deposit on Tuesday. Direct deposit dates will be on Wednesdays when Mondays or Tuesdays are holidays. Normal processing time is two to three weeks.

Required documents can be uploaded directly to the tuition website.

**Upload documents:**
Documents should be uploaded directly to the application to initiate your request for reimbursement. To start, select your application from the *Action Needed* list, and follow the steps listed below.

1. Submit your documents via the *Supporting Documentation* section of the application.
2. Drag your documents to upload or select files from your computer.
   - Select the type of document you are submitting.
   - Enter your grade for each course on the application.
   - Add a Comment if you have any questions.
3. Click Submit Document (optional).

When uploading grades you will be asked to select the grade you received. You are required to upload your grade report. Be sure the grade you select matches the grade listed on the uploaded grade report.

Upon successful upload, you will be able to view the documents now attached to the application in the View Supporting Documentation section of the Application Summary page.

*For uploaded grades you will be able to select the grade you received. You are still required to upload your grade report. Be sure the grade you select matches the grade listed on the transcript/grade report. Upon successful upload, you will be able to view the documents now attached to the application in the “Supporting Documentation” section of the Application Summary page.

25. **What if I receive a grant or other financial aid from my school or other**
sources?

Participants receiving grants, scholarships and/or Veteran's Administration benefits should fully utilize these funding sources prior to requesting funds through the tuition reimbursement program. All financial aid must be disclosed on the tuition reimbursement application when used concurrently with the tuition program.

26. What happens if my application is incomplete?

You will receive an email that requests any missing information we need in order to continue the review/approval process. The review process will resume upon receipt of your missing information.

27. Can my application or payment be denied?

Applications can be denied if they do not meet your company’s tuition reimbursement policy guidelines. Your eligibility, the field of study, degree program or educational provider may not meet the requirements for approval. Information regarding the exact reasons your application was denied are available via the eligibility event history table on your application.
Payments can be denied if you are not eligible, unsuccessful grades are submitted or documentation is submitted outside of the submission deadlines. Information regarding the exact reasons your payment was denied are available via the eligibility event history table on your application.

If you feel your tuition application was denied in error, you may submit a request for reconsideration to Bright Horizons Ed Assist Solutions by submitting a support ticket via the Support tab on the top navigation bar. Reconsideration requests must be submitted within 30 days of the original denial of tuition reimbursement and must include:

- Your name and Employee ID,
- Your manager’s name,
- An explanation of why you should be reconsidered
- Any relevant documentation to substantiate your claim

28. How do I make a correction to an application?

In some cases, you may drop, withdraw, change, or reschedule a course that you originally submitted on your application. Also, course numbers or titles may be different from what you originally entered. If this occurs, to avoid delays and confusion during the payment process, you must correct your originally submitted application as soon as possible.

Correcting application information:

- “Saved - Not Submitted”
- “Submitted - Incomplete”
- “Submitted - Pending Review”

Select your application from the Action Needed list, and follow the steps listed below. Make your desired changes, proceed to Step 5 of the application wizard, and click Submit to resubmit your application for review. You also can cancel your application by clicking the Cancel application on the bottom of the page.

No changes can be made once an application has reached a paid status or payment is in progress. Please contact Bright Horizons if you need further instructions.

29. What happens if I leave Houston Methodist while attending courses?

Employees who voluntarily resign their employment or who are terminated for cause
within twelve months of submitting for tuition assistance are required to repay any and all reimbursed tuition expenses. This repayment obligation covers any and all costs and tuition expenses reimbursed by Houston Methodist to the employee during the twelve-month period prior to the employee’s resignation/termination for cause for courses subject to the repayment provision of this policy. This information is set forth in the Houston Methodist Tuition Repayment Agreement, which employees will be required to sign in order to obtain approval of such courses.

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

Employees are not required to repay funds on application with a course date on or before 12/31/2018.