



SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund



EDUCATION AND TRAINING FUND

FREQUENTLY ASKED QUESTIONS

(SUMMARY PLAN DESCRIPTION)

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SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund

FREQUENTLY ASKED QUESTIONS

Introduction to the Fund

This is an education and training fund that has been established for you and other eligible employees by EvergreenHealth and SEIU Healthcare 1199NW. Under this program you will have the ability to further your education and career advancement within the organization.

Each calendar year EvergreenHealth contributes a percentage of the full-time and part-time SEIU Healthcare 1199NW bargaining unit payroll to the SEIU Healthcare 1199NW/EvergreenHealth Education and Training fund (see Article 12.12 of the collective bargaining agreement). Because this is a predetermined/fixed amount each year, funds are subject to availability at the time an employee submits his/her request.

Read this Summary Plan Description carefully so that you understand the provisions of the program and the benefits you will receive. You should direct any questions you may have to the Committee (see last page for contact information).

ARTICLE I PARTICIPATION

How long must I work at EvergreenHealth before I can begin participating in the fund?

You must have worked at EvergreenHealth for the previous consecutive 6 months and hold an FTE (full-time or part-time) position.

Do I have to meet any additional requirements prior to participating in the fund?

You must meet the eligibility requirements, including being covered under the SEIU Healthcare 1199NW Collective Bargaining Agreement, holding an FTE (part time or full time position) and have met EvergreenHealth performance requirements, meaning you have no written warnings in the previous 12 months. You will also be required to sign an employment commitment agreement (see article III).

Do I need to fill out an application to participate in the fund?

Yes. You will need to complete an application, which is available online ([Educational Assistance](#)) or through the Education Department.

When must I have my application submitted to the Committee?

Applications will be accepted on an ongoing basis. However, applications will not be accepted for individual courses already completed or currently underway. Incomplete applications

will be returned for completion and must be resubmitted. Employees requiring assistance may contact the Education Department. Funding will not be considered prior to approval of your completed application.

How is my application approved?

As long as you meet the eligibility requirements, are accepted to a qualifying program, and there are funds available your application will be considered for approval by the committee members.

If my application is denied, can I appeal the Committee's decision?

Yes, you will be notified in writing of any denial of your application within four weeks of the committee's review. You may appeal the committee's decision, but the appeal must be in writing and within four (4) weeks of receiving the denial. The committee will review and notify you of the final decision within four (4) weeks of receipt of your appeal.

ARTICLE II APPROVED EDUCATIONAL COURSES

What programs are accepted within the fund?

Applicable programs at accredited university, college, institute, technical or vocational schools (on-line or in classroom) include:

1. Skills Training Certificate Programs (e.g. C.N.A., M.A., Surgical Tech, 1 year or less to complete)
2. Degree programs required for occupations in healthcare (e.g. RN, MLT, Rad Tech, HIM, 2-4 years to complete)
3. Pre-requisite courses for entry into healthcare-related degree or certificate programs
4. Adult Basic Education (ABE), college readiness and college preparatory courses

Does the Education & Training Fund cover my prerequisite courses?

Yes.

Are my continuing education courses covered by the fund?

No, there is a separate funding source provided by the contract negotiated between SEIU Healthcare 1199NW and EvergreenHealth for continuing education (refer to Article 12.11 in the collective bargaining agreement). The fund does not sponsor the same types of programs.

What expenses are covered?

You may receive funding for tuition assistance, books, fees directly related to the course of study (e.g. lab fees, application fees), equipment required for classes (e.g. calculators, stethoscopes), funding instructors to teach on-site, college preparatory classes, career counseling, case management, licensing exam preparatory courses (maximum \$500.00) and fees for initial certification/licensing exams required for a course/courses (maximum \$250.00).

Are there limits on the amount I can receive per year?

Yes. This is a partial tuition assistance program where not all tuition/fee expenses are covered. The financial assistance is prorated based upon the employee’s current FTE.

NOTE: The annual maximum allowed is based on the IRS maximum, which is \$5250.

FTE	FUNDING	Annual Maximum
1.0	100% of annual maximum tuition assistance allowed	\$5250
0.9	90% of annual maximum tuition assistance allowed	\$4725
0.8	80% of annual maximum tuition assistance allowed	\$4200
0.7	70% of annual maximum tuition assistance allowed	\$3675
0.6	60% of annual maximum tuition assistance allowed	\$3150
0.5	50% of annual maximum tuition assistance allowed	\$2625
0.4	40% of annual maximum tuition assistance allowed	\$2100
0.3	30% of annual maximum tuition assistance allowed	\$1575
0.2	20% of annual maximum tuition assistance allowed	\$1050
0.1	10% of annual maximum tuition assistance allowed	\$525

What are the Internal Revenue limits on the amount of funding that is excluded from my taxable income?

The SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund follows the IRS Guidelines. Any amounts reimbursed in excess of the current IRS limit of \$5250 may be considered taxable income.

**ARTICLE III
FUNDING**

How do I obtain funding?

Once you submit your application it goes through an HR review and then to the SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund committee for assessment. Applications

will not be accepted for individual classes already completed or currently underway at the time of application submittal. Funding will not be considered prior to approval of your completed application. Once your application is approved the funding may be reimbursement directly to you or paid to the school through the voucher process when available.

Reimbursement:

- Reimbursements will occur following each reimbursement request in accordance to EvergreenHealth's accounting department processes (<https://www.lucidoc.com/cgi/doc-gw.pl?ref=everg5:11608>).
- Employee must submit, no later than sixty (60) days from the date expenses were incurred and submitted within year incurred, original itemized receipts (i.e. application, registration, statement of account) for applicable expenses.
- Employee to follow the reimbursement process available online ([Educational Assistance](#))
- Documentation of successful course completion (i.e. grades) must be submitted at the end of each course and prior to additional funding requests.

Voucher:

- Vouchers will occur following approval of the educational institution.
- Employee must follow the voucher process available online ([Educational Assistance](#))
- Employee must be aware of the tuition deadline dates in advance, register for classes as soon as possible and submit their schedule & charges to the Education Department within **three business days of registration**.
- Vouchers will offer financial assistance prorated based upon the employee's current FTE. The tuition payment is sent directly to the pre-approved school without impacting the participants time &/or class schedule.
- Vouchers cover tuition and approved fees only. Books and supplies will go through the reimbursement process.
- Employee is responsible for any outstanding charges not covered by the SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund voucher payment.

ARTICLE IV TUITION ASSISTANCE REQUIREMENTS

Must I maintain a certain grade point average throughout my educational courses?

Yes. The fund requires that you maintain a minimum 2.0 cumulative grade point average (GPA) as well as those requirements of the specific program(s).

Are there a certain number of hours I must work while I am completing the educational courses?

In order to receive funding, you must work a minimum of a 0.1 FTE (full-time or part-time). Funding is prorated based upon the FTE you are working at the time of your funding request.

Once I finish my educational program how long must I remain an employee with EvergreenHealth?

You must remain an employee with EvergreenHealth at the pre-education program FTE as follows, unless no equivalent or greater FTE is available.

- Receive less than or equal to \$2600.00 in tuition assistance: work one (1) year at the pre-program FTE following either 1) program completion or 2) the last class taken, whichever occurs last, unless no equivalent or greater FTE is available.
- Receive greater than or equal to \$2601.00 in tuition assistance: work two (2) years at the pre-program FTE following either 1) program completion or 2) the last class taken, whichever occurs last, unless no equivalent or greater FTE is available.

What happens if I reduce my FTE below my pre-education FTE following completion of the program or last class?

You may be required to repay the fund for funds received. Any extenuating circumstances surrounding your decrease in FTE may be appealed to the SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund Committee. However, you still may be required to repay.

What happens if I fail a class, drop, withdraw or change a class to audit status?

It is the employee's responsibility to notify the Education Department, in writing, within 30 days of the change in status (fail, drop, withdraw, audit).

An employee, who fails, drops, withdraws, or audits a class after EvergreenHealth has already reimbursed the employee or paid the college for tuition and/or any class related fees, will be required to repay EvergreenHealth the same amount the employee was reimbursed. There are options:

1. *Repayment:* repayment provides the employee the opportunity to continue to access the Fund as well as receive reimbursement for successful completion of the same class at a future date. A repayment plan will be arranged between the employee and EvergreenHealth to collect the amount owed. Additional reimbursement/training funds cannot be utilized until repayment of the previous funds has been received in full.

2. *No Repayment*: if the employee fails to reimburse the Fund they will be ineligible for Fund benefits for two (2) years from the beginning date of the class in which academic requirements were not met or that the employee withdrew from, dropped, or changed to audit status. The employee will be responsible for any costs related to retaking a class that was failed, dropped, withdrawn or audited.

What happens if I discontinue or drop out of school?

If you discontinue your school program your status will change to Inactive. A letter of notification of status change will be sent at six (6) months of inactivity and at twelve (12) months your status will be changed to inactive.

Should you decide to return to school, you will need to submit a new tuition assistance application for committee review and approve.

What happens if I drop to per diem status or terminate employment prior to fulfilling the employment commitment requirement?

If you decrease to per diem status for reasons other than attending school prior to completion of the employment commitment period, you will be required to repay EvergreenHealth for tuition assistance funds received prorated by number of commitment months not fulfilled.

If you terminate your employment with EvergreenHealth prior to completion of the employment commitment period, you will be required to repay EvergreenHealth for tuition assistance funds received prorated by number of commitment months not fulfilled.

Upon termination or change to per diem status for reasons other than attending school, EvergreenHealth will deduct a percentage of the full amount owed from your final paycheck and from any PTO you would otherwise be entitled to receive. If your final paycheck and PTO are insufficient to cover the amount owed, a repayment plan will be arranged between you and EvergreenHealth to collect the remaining amount owed within 12 months of your last day worked.

Example:

If an employee received \$1800 in tuition assistance, the employment commitment period would be one year upon program completion or last class taken, whichever comes last.

However, if the employee terminated or changed to per diem status after only working for 3 months following program completion or last class taken, he/she would have 9 months of the agreement left to fulfill.

To determine the amount of repayment, the funding amount received would be divided by the commitment expectation, and then multiplied by the number of months not fulfilled:

- Amount received = \$1800
- Commitment expectation = 12 months
- Amount received (\$1800)/number of commitment months (12) = \$150 per month
- Number of months not fulfilled (9) X \$150/month = \$1350

- The amount the employee would need to repay the fund is \$1350.

**ARTICLE V
REPAYMENT SCHEDULE**

When must I repay the educational costs?

Your repayment obligation starts if you fail a class, drop, withdraw, or change a class to audit and/or should you not honor the employment commitment agreement made when you receive funding (i.e. reduction in FTE, change to per diem status)

**ARTICLE VI
ADDITIONAL INFORMATION**

The SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund Committee reserves the right to discontinue funding if the employee fails to meet GPA, or performance requirements, or becomes inactive in the program.

EvergreenHealth's contribution to the fund is a predetermined/fixed amount each year, therefore funds are subject to availability at the time the employee submits his/her request. As funds are exhausted, reimbursement will be based upon seniority in the SEIU Healthcare 1199NW/EvergreenHealth Education and Training Fund

EvergreenHealth and SEIU Healthcare 1199NW may jointly seek to participate in grant funding opportunities, including HEET and other state funds and federal grants. Funding for programs such as these may follow different guidelines.

The terms and conditions of the policy are subject to change. The committee will review the policy at least annually and will also revise/update it as needed.

If you have any additional questions regarding the Fund, please contact the EvergreenHealth Education Department at 425-899-2524 or 425-899-2446 or SEIU 1199NW organizer at 425-917-1199.