

# UC Davis Health Staff Tuition for Education Program (STEP) Reimbursement Guidelines

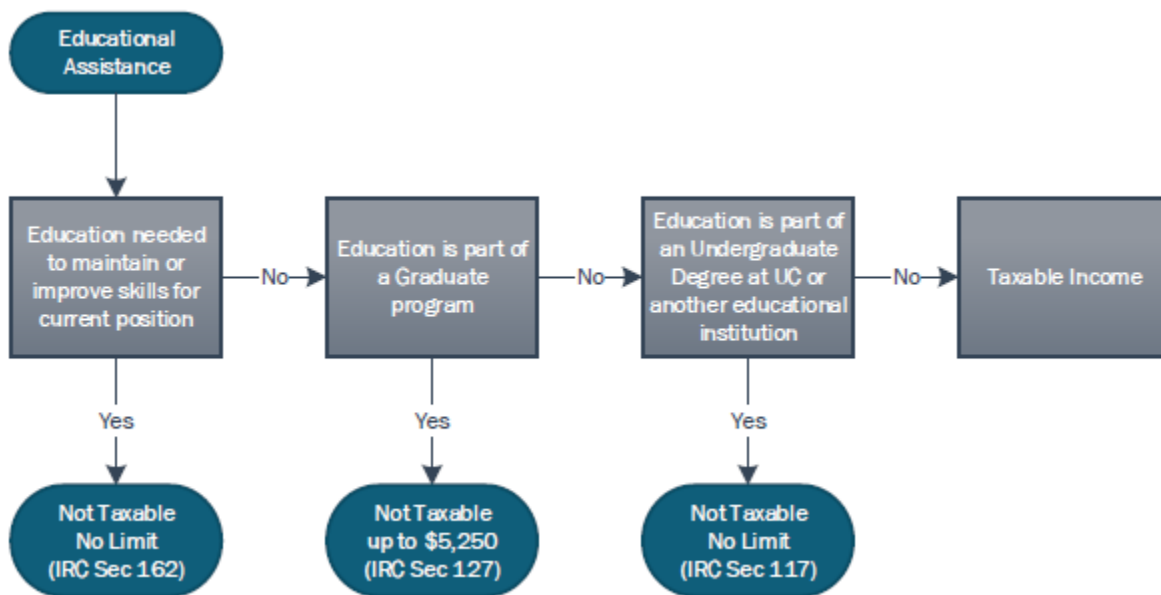
## WHAT IS STEP?

The UC Davis Health (UCDH) Staff Tuition for Education Program (STEP) is an educational reimbursement program available to eligible employees in support of their career development at UCDH. The primary focus of STEP is to encourage eligible employees in their efforts to pursue accredited matriculated degree programs (e.g. Associates, Bachelors, Masters, Doctoral) as well as certain accredited allied health vocational and specialized certificate programs that prepare candidates for skilled allied health positions which are significantly utilized at UCDH.

Preauthorization of course of study is not required. For questions regarding the eligibility of a specific program, contact [Learning and Development](#) prior to submitting a reimbursement request. Reimbursements will not be provided for ineligible programs.

Eligible employees may be reimbursed up to \$4,000 per calendar year (January – December), with a \$16,000 maximum lifetime benefit cap, for tuition and materials/books for matriculated (degree-seeking) programs, specific allied health vocational certificate programs, or other specialized certificate programs. Reimbursements are subject to be taxed in accordance with IRS guidelines and/or UC policy. See below Program Taxability Diagram for reference.

## Tuition Reimbursement\*: Program Taxability Diagram



\*approved non-taxable tuition reimbursement requests will be paid via check

\*\*approved taxable tuition reimbursement requests will be manually added to employee's paycheck as imputed income

## **UC Davis Health Staff Tuition for Education Program (STEP) Reimbursement Guidelines**

*STEP is administered by the Human Resources Learning and Development unit. Guidelines and reimbursements are subject to change at any time without notice. Reimbursements may also be impacted by budgetary and other considerations.*

### **AM I ELIGIBLE TO PARTICIPATE IN STEP?**

If you are an employee of UCDH and meet all four points of the following criteria you are eligible to participate in STEP:

- UCDH Career employee
- Completed probation
- Satisfactory or better rating on most recent employee performance appraisal
- No disciplinary action within the two years immediately preceding the reimbursement request

### **WILL MY EDUCATIONAL PROGRAM QUALIFY FOR STEP?**

If you are unsure if a program qualifies, please contact Learning and Development. Both online and instructor-led courses of accredited programs qualify if they are one of the following types:

- Prerequisite Courses for matriculated programs (to qualify for reimbursement, proof of prerequisite requirement must be submitted)
- Specific Skilled Allied Health Vocational Certificate Programs (if unsure, check with Learning and Development)
- Associate Degree
- Bachelor Degree
- Master Degree
- Doctorate Degree

### **WHICH EXPENSES ARE ELIGIBLE FOR REIMBURSEMENT?**

- Tuition
- Fees that are required for enrollment or attendance at an eligible educational institution (excludes health fee)
- Books and supplies

### **WHAT FORMS OF PAYMENT ARE ELIGIBLE FOR REIMBURSEMENT\*?**

- Cash
- Check
- Credit Card
- Student Loan

*\*Payments made by grants, scholarships, gift cards, or friends are not eligible for reimbursement.*

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### **ARE THERE LIMITS TO THE AMOUNT OF REIMBURSEMENTS I MAY RECEIVE THROUGH STEP?**

Eligible educational expenses paid for by the employee may be reimbursed up to \$4,000 per calendar year (January – December). Amounts in excess of \$4,000 will not be rolled over to the next calendar year. Once the lifetime maximum of \$16,000 has been reached, the employee no longer qualifies for STEP.

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### **I MEET ALL OF THE REQUIREMENTS - HOW DO I REQUEST A STEP REIMBURSEMENT?**

You have a 60-day window after the completion of coursework for that academic period (term, quarter, or semester) to submit a STEP request for reimbursement consideration. STEP requests received on day 61 or after will not be eligible for reimbursement.

Submit your tuition reimbursement request and supporting documentation through the [STEP online portal](#).

Your required supporting documentation and all receipts must include:

- Your name
- Name of educational institution (as appropriate)
- Date

Supporting documentation includes:

- Itemized tuition invoice
- Paid tuition receipt indicating form of payment
- Itemized book/materials invoice
- Paid book/materials receipt indicating form of payment
- Evidence of completion of your class, and proof of a “C” grade, Credit\* or Pass\* (\*accepted only for those courses that do not provide a letter grade).

### **AFTER SUBMITTING MY STEP REQUEST, HOW DO I RECEIVE MY REIMBURSEMENT?**

After your STEP request has been processed and approved it is routed to Accounts Payable or Payroll for payment processing. You will receive your reimbursement one of two ways; (1) approved non-taxable tuition reimbursement requests will be paid via check or (2) approved taxable tuition reimbursement requests will be manually added to employee’s paycheck as imputed income. If you have recently moved you are encouraged to verify your mailing address with the UCDH Payroll Office so as not to incur additional delays. The reimbursement process may take up to six weeks.

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### WHAT ELSE DO I NEED TO KNOW?

You are not eligible for STEP if:

- You have an academic title (e.g. fellows, residents, post doctorates)
- You are a contractor, casual, contract, or per diem appointment
- Your appointment type and/or position change to an ineligible classification (pending requests will be voided)
- You separate/terminate from UCDH (and pending requests will be voided)

The following are not eligible for STEP reimbursement

- Classes taken prior to successful completion of your probationary period
- STEP requests submitted 61-days or more after course completion
- Any expenses paid by grants, scholarships, gift cards, or friends
- Technology equipment, book bags, etc.
- Shipping and handling fees
- Miscellaneous educational institution fees (e.g. parking, health fees, graduation, test/exam fees)
- Student loan application fees
- Conference and seminar registration fees\*
- Certifications (e.g. PMP, CA HIMS, CBCS)\*
- Continuing Education Units (CEU)\*
- Membership, licensing and exam fees\*
- Travel, lodging, meals and parking expenses\*

For more information, please refer to the [IRS guide to Qualified Education Expenses](#).

*\*Work-related conferences, seminars, Continuing Education Units (CEU's), and professional membership requests may be routed by the employee to their department for approval and reimbursement consideration.*

Unacceptable proof of payment include

- Receipts with a name other than the employee's
- Credit card statements
- Bank account statements
- Copy or carbon of a personal check

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