OVERVIEW

The UC Davis Health System Staff Tuition for Education Program (STEP) is an educational reimbursement program available to non-academic UCDHS Career employees in support of career advancement training. The primary focus of STEP is to encourage eligible employees in their efforts to pursue accredited matriculated degree programs (e.g. Associates, Bachelors, Masters, PhD, etc.) as well as certain accredited vocational and other specialized study (e.g. phlebotomy, radiologic technologist, etc.) that prepare candidates for skilled allied health positions that are significantly utilized at UCDHS. Eligible vocational programs typically require one to two years of study to complete.

Specified educational expenses paid for by the employee may be reimbursed up to $4,000 per calendar year (January – December) for matriculated (degree-seeking)/vocational programs taken in said calendar year with a $16,000 maximum lifetime benefit.

Interested employees must apply to the STEP within 60 days of completing a course for which reimbursement will be sought. For questions regarding the eligibility of a particular program, contact Training and Development prior to enrollment. No reimbursements shall be provided for ineligible training programs. A complete STEP packet shall include the following:

- STEP Application or Update form (must include supervisory signature)
- Itemized receipts (indicating specific amounts paid and form of payment for tuition, books, etc.)
- Evidence of passing grades

This program is administered by Human Resources’ Training and Development Unit. Program guidelines are subject to change and may be impacted by budgetary and other considerations. For more information, you may contact Training and Development at (916) 734-2676 or TrainingandDevelopment@ucdmc.ucdavis.edu.

PROGRAM ELIGIBILITY

Employee Eligibility Requirements

- UCDHS non-probationary Career employees.
- Satisfactory or better rating on most recent employee performance appraisal.
- No corrective action within the two years immediately preceding the application nor at any time during participation in the Program.
- Reimbursement requests must be submitted within 60 days of coursework completion.
Program Ineligibility

- Employees with academic titles (e.g. fellows, residents, post doctorates) and/or contractors, casual and per diem appointments).
- Participants who separate/terminate from UCDHS (pending requests will be immediately voided).
- Appointment type and/or position change to an ineligible classification (pending requests will be immediately voided).
- Reimbursement requests made prior to meeting program eligibility (e.g. classes taken prior to successful completion of a probationary period).

Eligible Reimbursement Expenses

- Tuition for matriculated (degree-seeking) programs (e.g., AA, BA, MA, PhD, etc.).
- Vocational Certificate* Programs (typically 1-2 years in length) that result in allied health, healthcare administration and other specialized programs that prepare candidates for immediate entry to UCDHS employment and are significantly utilized at UCDHS (e.g. phlebotomy, radiologic technologist, etc.).
- Prerequisite courses for a degree-seeking program. These are courses that must be successfully completed in order to enroll in a class that is part of a matriculated program and are typically listed as part of a class’ eligibility requirements. Proof that a class is a matriculated program prerequisite is required for it to qualify for reimbursement.
- Required books and class materials.

Ineligible Expenses

- Requests for reimbursement that are more than 60 days after course completion.
- Tuition, books and class materials paid by grant funds, scholarships or gift cards.
- Certifications (e.g. PMP, CA HIMS, CBCS)
- Conference and seminar registration fees
- Continuing Education Units (CEU)
- Membership, licensing and exam fees
- Travel, lodging, meals and parking expenses
- Supplies and other miscellaneous fees
- Shipping and handling fees
Note: Work-related conferences, seminars, and Continuing Education Units (CEU’s) requests may be routed by the employee to the employee’s home department for approval and reimbursement consideration.

REIMBURSEMENT REQUIREMENTS

Program Forms

- The Staff Tuition for Education Program (STEP) Application is used for initial/first time request for reimbursement.
- The STEP Update establishes continued program eligibility and is required for each subsequent (after the first submission) reimbursement request.

Receipts

Itemized receipts and evidence of completion must accompany the STEP Application or the STEP Update. Only original or online itemized receipts will be accepted. The receipt should indicate the following:

- Name of Educational Institution
- Employee name indicating payment was made by employee
- Form of payment (check, cash, credit card, loan, etc.)
- Date of Payment
- Itemized detail of eligible fees (tuition, books, etc.) including course name(s) and cost

Examples of unacceptable proofs of payment include:

- Receipts with a name other than that of the employee
- Credit card statements
- Bank account statements
- Copy or carbon of a personal check
- Student loan applications

Evidence of Completion of Class

Reimbursement will be awarded after successful completion of the class. A grade of “C” or better must be achieved to be considered “passing.” In cases of “pass-no pass” grading systems, a “pass” grade must be achieved. Proof of passing quarterly, semester, or other term grades must also accompany the STEP Application or Update form.
Evidence of Completion of Course of Study

Upon final completion of the educational program of study, please submit a copy of the degree or certificate for which you are being reimbursed.

REIMBURSEMENT PROCESS

Deadline

Training & Development must receive all documents within 60 days of coursework completion to be eligible for reimbursement consideration.

Employee

1. Print, complete, and sign the STEP Application (first time submission) or the STEP Update (subsequent submissions).
2. Take the completed form to your supervisor for verification and signature.
3. Include the following items with your completedSTEP Application or Update submission:
   - Original itemized receipts indicating specific amounts paid and form of payment for tuition, books, etc.
   - Verification of grades of “C” or better
   - Career Development Plan (first-time Applicants only)
   - Deliver the completed STEP packet to the Training & Development Unit. Please note only STEP forms with original “wet” signatures can be accepted.

Supervisor

Complete the Supervisor section of the STEP Application or Update Form by

1. Verifying career employee status.
2. Verifying probation period is complete.
3. Verifying no corrective action was taken in the last two years.
4. Indicating the most recent appraisal rating of the employee.
5. Signing the STEP form and returning it to the employee.

Submission Guidelines

- All STEP forms must be completed and be accompanied by all required documentation.
- Incomplete application packets will be returned to the employee without processing.
All documents and receipts should be hand-delivered or sent via inter-office/U.S. mail to the Human Resources Training & Development Unit at the following address:

UCDHS Human Resources
Training & Development, Room 2600
2730 Stockton Blvd. Ticon III
Sacramento, CA 95817

Reimbursement Checks

After your request has been administratively processed it is routed to Accounts Payable for check issuance. This entire process typically takes 4-6 weeks.

Please be advised that Accounts Payable will mail reimbursement checks to the employee address listed on file with the UCDHS Payroll Office (which may be different than the address listed in your At Your Service profile). Participants are encouraged to verify their mailing address with the UCDHS Payroll Office.

You may also request direct deposit of your STEP reimbursement by signing up for direct deposit through MyTravel Center at https://mytravel.ucdavis.edu.

IMPORTANT REMINDERS & CONSIDERATIONS

Calendar Year and Lifetime Maximums

If an employee’s reimbursement request(s) exceed(s) the calendar year maximum, reimbursement will only be made up to the calendar year maximum of $4,000. Amounts in excess of $4,000 cannot be rolled over to the next calendar year. There is a possibility that reimbursement requests received in the month of December (that fall within the annual $4,000 limit) may be applied to the following calendar year limit due to fiscal processing cycles. Participants are strongly encouraged to submit documents, proof of grades and receipts as soon as they become available.

Once the lifetime maximum of $16,000 has been reached, the employee no longer qualifies for STEP.
Educational Institution Discounted Tuition Programs

Participants utilizing reduced/discounted tuition programs available through universities, colleges or training facilities may be subject to eligibility verification prior to enrollment. Please contact Training & Development for more information.

Loans in Repayment

Eligible employees who began their degree program between 2004 – 2012 and were informed at initial application that they were ineligible for reimbursement until initiation of loan repayment (per previous Educational Reimbursement guidelines) may now seek reimbursement under STEP. Employees for whom this circumstance applies may be eligible for reimbursement of loan monies applied to tuition and books if program eligibility criteria were met at the time the classes were taken and at the time reimbursement is requested.

To receive reimbursement, effected employees must initially submit a STEP Application form in addition to all passing grades and receipts from the educational institution. The receipts must indicate that the tuition was originally paid by loan. Previous reimbursements under the former Educational Reimbursement Program as well as current loan reimbursement requests are subject to the lifetime reimbursement maximum of $16,000.

Effectuated employees may receive installment payments for eligible loan expenditures up to the $4,000 per calendar year maximum. It will be the employee’s responsibility for subsequent requests to submit a STEP Update form at the beginning of each calendar year to receive that year’s reimbursement and participants must remain eligible in all reimbursement criteria.

Tax Liability

Participants are responsible for any tax liability resulting from employer provided tuition assistance. UC Davis Health System is required by law to report to the Internal Revenue Service the amount of tuition assistance received that is subject to taxes.