

# **Research Foundation for Mental Hygiene, Inc.**

## **Educational Assistance Program**

The Board of Directors of the Research Foundation for Mental Hygiene, Inc. (RFMH) recognizes how important continuing education is to the career opportunities of its employees. The RFMH Educational Assistance Program provides partial reimbursement for courses taken on a part-time basis at an accredited institution. The courses must be relevant to the employee's current position or to a career field existing within RFMH in which the employee may be reasonably expected to work.

### **Eligibility**

- 50% RFMH employee for a minimum of 1 continuous year
- An **active** RFMH employee at the time the course is completed

### **Eligible Courses**

- Job or career related undergraduate or graduate credit-bearing courses
- Non-career related courses (i.e. Physical Education) will be accepted if they are required as part of the degree program in which the applicant is matriculated
- Non-credit courses that lead to certification in an RFMH career or profession

### **Institutional Accreditation Criteria**

- Chartered, approved or authorized to confer a degree by the New York State Board of Regents or an equivalent recognized educational accrediting body
- Licensed or registered by the New York State Education Department or an equivalent recognized educational accrediting body

### **Educational Leave**

- Available when the course is not given at any other time other than during employee's scheduled work hours
- Limited to 52 hours per year
- Not to be used for taking or studying for tests
- Employees may be required to make up time lost due to educational leave

### **Exclusions**

- **FEES – NON-REIMBURSABLE**

Ancillary fees that may be required by the educational institution, including but not limited to:

- |                      |  |
|----------------------|--|
| * Application Fees   | * Transcripts                                  |
| * Late registration  | * Health care services (mandatory or optional) |
| * Student activities | * Matriculation                                |
| * Student licensing  | * Graduation                                   |
| * Parking            | * Diploma                                      |

- **COURSES – NOT ALLOWED**

- Computer training classes (i.e. Word for Beginners, Advanced Excel)
- Courses taken in preparation for professional licensing exams or professional licensing exam fees

### **Selection Committee**

Candidate's applications will be reviewed by the local RFMH Educational Assistance Committee after the Educational Assistance application deadline

## **Availability of Funds**

The amount of funds available for this program is based on the fiscal/grant volume of the RFMH Division at which the employee works. Accordingly, it is unlikely that all applicants will be approved

## **Application Deadlines**

RFMH Educational Assistance applications **must** be received by:

- September 30 for the Fall semester
- January 31 for the Spring semester
- June 30 for the Summer semester

## **Reimbursement**

- 75% of the cost of tuition, textbooks, and course fees, up to a maximum of \$5,250 per **calendar** year.
- Employees working less than 100% time are reimbursed at a rate that equates to their percentage of regular full time employment at the time the course is completed

## **Reimbursement Process**

Employees are reimbursed for tuition, course fees, and required books upon successful completion of the course work. Employees must complete the required forms, including Verification of Financial Aid, and submit all required receipts and forms to the local RFMH personnel/payroll office. Approved reimbursement requests must be submitted within 60 days of the completion of the coursework in order to be guaranteed reimbursement

## **Other Funding Sources**

If an RFMH employee is receiving federal or state grants, a private scholarship, or another employer is funding their tuition, the amount of the aid must be deducted from the RFMH reimbursement request

## **Grade Requirements**

- C or better for undergraduate work
- B or better for graduate work
- C- for undergraduate work and B- for graduate work are within acceptable limits for reimbursement
- Pass for courses with a pass/fail grading system

## **Incomplete Grades**

Incomplete grades may be reimbursed upon receipt of a final qualifying grade. Completion must be within 12 months of the end date of the course. Reimbursement is dependent on funds that are available at the time of reimbursement

## **Taxability**

According to the IRS, employer-paid educational benefits for undergraduate and graduate courses are excludable from income in amounts up to \$5,250 for courses beginning before January 1, 2003. For up to date information, including information on a date extension, refer to IRS publications on this topic: Notice 97-60, Publication 970, Publication 535 and Publication 508. For further information call the IRS at (800)929-1040, consult the IRS Internet site at [www.irs.gov](http://www.irs.gov), or call your tax consultant.

## **Financial Aid**

Check with your educational institution for information on:

Aid for Part-time Study (APTS)

Federal Pell Grant Program

Guide to Financial Aid for Working Adult Students

Federal Tax Credits for Education

Or call (1-800-253-4332)

**\*\*RETURN ALL FORMS TO YOUR LOCAL HUMAN RESOURCES/PAYROLL OFFICE\*\***