

## **NYSNA Tuition and Continuing Education Fund**

### **Frequently Asked Questions (“FAQs”)<sup>1</sup>** **(July 1, 2023)**

#### **1. What is the NYSNA Tuition and Continuing Education Fund?**

- a. The NYSNA Tuition and Continuing Education Fund (“the Fund” or “TCE Fund”) provides tuition reimbursement for academic courses and non-academic continuing educational offerings, as well as reimbursement of certain other related educational fees, such as those required for course registration and examinations.

#### **2. How was the NYSNA Tuition and Continuing Education Fund established?**

- a. The Fund was established by the January 21, 2010, to June 5, 2019 Collective Bargaining Agreement (CBA) between the New York State Nurses Association and the City of New York and the New York City Health + Hospitals. Prior to the Fund’s effective date of May 1, 2016, education benefits were provided by the City and NYC H+H.

### **Eligibility**

#### **3. Who is eligible for tuition reimbursement under the Fund?**

- a. All full-time, part-time, and hourly nurses covered by the CBA are eligible for this benefit from the first day of employment until they are no longer covered by the Agreement. Part-time and hourly nurses are eligible for a reduced benefit (see Question #6 below). Per diem employees are not eligible for benefits.

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<sup>1</sup> These “Frequently Asked Questions” are intended to supplement the TCE Fund Summary Plan Description (SPD). While every effort has been made to make these FAQs as complete and as accurate as possible, they do not restate the existing terms and provisions of the SPD other than the specific terms and provisions they are modifying. If any conflict should arise between these FAQs and the terms of the SPD, or if at any point is not discussed in these FAQs or is only partially discussed, the terms of the SPD will govern in all cases.

The Board of Trustees of the TCE Fund reserves the right, in its sole and absolute discretion, to interpret and decide all matters under the TCE Fund. The Board also reserves the right, in its sole and absolute discretion, to amend, modify or terminate the TCE Fund or any benefits provided under the TCE Fund (or qualification for such benefits), in whole or in part, at any time and for any reason.

**4. Can I receive reimbursement if I am on an official leave of absence?**

- a. Participants in active pay status (either actively employed or on a paid leave of absence) during the time the course is taken and completed can receive a reimbursement. Participants on an unpaid leave of absence are ineligible for Fund reimbursement.

**5. If I am suspended without pay, am I still eligible for reimbursement under the Fund?**

- a. You will still be eligible for reimbursement of claims incurred prior to your suspension, but any claims incurred during a suspension will be denied. However, if your suspension is reversed through arbitration or settlement, tuition and continuing education expenses incurred during that period become eligible for reimbursement.

**Annual Claim Amounts**

**6. What is the maximum reimbursement amount under the Fund?**

- a. Full-time nurses may receive a maximum reimbursement amount of up to \$7,200 per fiscal year, which is July 1 to June 30.
- b. Part-time and hourly nurses who work between 22.0 and 37.5 hours per week may receive a maximum reimbursement of \$3,600 per fiscal year.
- c. The above maximum reimbursement amounts have been set by the Trustees and are subject to review and adjustment by the Trustees on an annual basis.

**7. Are tuition benefits taxable to me under IRS Guidelines**

- a. Benefits that exceed \$5,250 in a calendar year are taxable under IRS Guidelines. To the extent the Plan determines that benefits it paid taxable benefits to you the Trust will be issue a Form W-2 to you, which should be reported on your personal tax return. With respect to the remaining benefit amounts paid to you that are not reported on a W-2, you should consult with a tax professional regarding the taxability of those benefits.

## **Covered Fund Reimbursements**

### **8. What types of courses are eligible for reimbursement?**

- a. The Fund will reimburse tuition and required fees for academic courses for Baccalaureate and advanced degrees (Master's and Doctorate) in nursing and continuing education programs and non-academic courses.
- b. The Fund will also reimburse costs for courses, conferences, workshops, seminars and other programs that apply to the participant's clinical specialty or nursing care and management of the population at large, as well as review courses for certification examinations accredited by approved national and state nursing organizations.
- c. Courses in cultural competency skills, such as language courses, and courses in computer skills are covered by this benefit.
- d. *The Fund will not reimburse for courses mandated by your Employer for your continued employment. Mandatory courses are to be paid by your Employer.*

### **9. Can I be reimbursed for maintenance of matriculation fees for my academic degree?**

- a. Yes, reimbursement is available for maintenance of matriculation fees. You must submit documentation within three (3) months of your degree being granted. The period of matriculation for which the fees can be reimbursed cannot extend beyond five (5) years prior to the granting of your degree.

### **10. Are self-study/independent study and internet courses covered?**

- a. Yes, the Fund will reimburse tuition and fees for self-study, independent study, and online courses that meet the criteria for the Fund's academic, non-academic and continuing education programs.

### **11. I would like to complete my Bachelor's Degree in an area of study outside of nursing. Will the Fund reimburse my tuition?**

- a. Unless the degree is either a Baccalaureate in Nursing or an advanced nursing degree, the Fund will provide no reimbursement.

### **12. Are courses in alternative health, such as yoga, massage, meditation, and Eastern medicine subject to reimbursement by the Fund?**

- a. If the course grants RN continuing education credits or has direct application to the nurse's clinical environment, it may be reimbursed. Documentation must be provided

to demonstrate the course is relevant and applicable to the participant's clinical practice.

**13. Will I receive reimbursement for courses given out-of-town or overseas?**

- a. Yes, as long as the other criteria are met, course fees are eligible for reimbursement regardless of where the course is offered.

**14. Are transportation, meals and lodging costs reimbursed?**

- a. No, the Fund will not reimburse transportation, meals or lodging costs.

**15. Can I receive reimbursement for required textbooks, software, or other materials?**

- a. Textbooks (printed or electronic) will be reimbursed up to \$300 per academic course. Reimbursement of textbooks is included in the annual maximum.
- b. The Fund will not pay for the cost of software, audio/visual or other materials necessary for the course.

**16. Do I have to pass the course to receive reimbursement?**

- a. Yes, successful completion of the course or educational program is required to receive reimbursement. If you fail, withdraw or receive an incomplete, you will not be reimbursed.

**17. If I file a claim to be reimbursed for a certification examination review course, and I fail the exam, will I be reimbursed for the review course?**

- a. If you complete the review course, but fail the examination, you will be reimbursed for the review course.

**Filing a Reimbursement Claim**

**18. When and how should I file for a reimbursement?**

- a. You must complete and submit the "Reimbursement Claim Form" within three (3) months of completion of the course, conference, workshop, seminar, or other educational offering. The form is available online at [www.ASOnet.com](http://www.ASOnet.com). Expenses for Unlimited Continuing Education Subscriptions must be submitted within 3 months once the first certification is completed. Submitted expenses for textbooks must be itemized and referenced to the course that is requiring the book.

- b. Proof of successful course completion (such as a transcript or certificate) and proof of payment (e.g., copy of cancelled check, credit card statement, or bursar's receipt), as well as the claim form, should be sent to Administrative Services Only, Inc., online at [www.ASONet.com](http://www.ASONet.com), or via fax (855-255-0904) or mail to Administrative Services Only, Inc., Department 136T, PO Box 9005, Lynbrook, NY 11563.

**19. Who should I contact if I have a question about a claim?**

- a. Administrative Services Only, Inc. ("ASO") is the Fund's third party administrator and will be handling the processing and approval of reimbursement claims and the issuing of payments. ASO is the contact for all participants' inquiries related to the Fund. They can be reached by telephone at or (888) 692-7671.

**20. When will reimbursements be paid to participants by the Fund?**

- a. Reimbursements will be mailed within 6 to 8 weeks of receipt of completed reimbursement claim forms and requisite documentation. Reimbursements are on a fiscal year basis (July 1st to June 30th) for courses and other programs completed within that fiscal year.

**21. What happens if I fail to submit necessary documents?**

- a. It is your responsibility to provide all the necessary documentation to ASO within three (3) months of completion of the course or other educational offering. If a submission is not complete, it may be denied.
- b. If additional information is requested, you will have 60 days from date of the request to provide or your claim for benefits will be processed based upon the information presented.

**22. Are there any exceptions to the three (3) month filing deadline?**

- a. Yes, non-reimbursable courses taken as a prerequisite for matriculation into an approved Baccalaureate or Master's Program may be reimbursed after the participant has been accepted as a student in the program. Such reimbursements will be eligible for up to two (2) years prior to completion of the degree program, and the request for reimbursement must be submitted within three (3) months of acceptance into the program.
- b. Reimbursement is also available for maintenance of matriculation fees for up to five (5) years prior to the granting of your degree. You must submit documentation within three (3) months of your degree being granted to be reimbursed for these fees.

- c. Upon submission of proof of incapacitation or other extenuating circumstances that preclude you from timely submitting a claim within the three (3) month deadline, the Trustees may consider a late-filed claim within their sole and exclusive discretion.

**23. Do I have to obtain preapproval of the course in order to be reimbursed?**

No, preapproval is no longer required. This is a significant change from the previous reimbursement process. Please refer to the SPD for full details on whether a given course or offering will be eligible for reimbursement.

**Requests for Educational Leave**

**24. What is the process for obtaining educational leave to attend courses and continuing education offerings?**

- a. All requests for educational leave should be directed to your Employer, as only your Employer can grant educational leave. The Fund provides reimbursement of tuition and certain other related educational fees. The Fund cannot grant time off or reimburse for time lost for educational purposes.

**Appeals Process**

**25. Can I appeal the decision of the Fund to deny reimbursement?**

- a. Yes, you have the right to appeal a denial of your reimbursement claim. ASO will notify you that your claim has been denied in writing, along with the reason, within ninety (90) days of receipt of your claim.
- b. You may appeal the denial by submitting an appeals form, which is available online at [www.ASONet.com](http://www.ASONet.com). You must also provide any and all documentation to support your appeal.
- c. Appeals must be submitted to the Plan Administrator (not ASO) within sixty (60) days after the date of the notice of denial, and will be considered by the Trustees.
- d. The Trustees will review the appeal at their next regularly scheduled meeting. The Trustees' decision is final and binding.