Atrius Health

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Introduction

Please click on the link below that is applicable to your situation. If you have any questions about the process, please contact Voya Benefits Company (Voya) via:

- Phone at (833) 232-4673
- Email at HASTuition@voya.com

Policy

Atrius Health recognizes the importance of education for employee satisfaction, retention, and career development. The Tuition Assistance Plan is designed to encourage and support employees in building an educational foundation that will help prepare them for possible advancement within the company.

Eligibility

Active, regular employees who have a position that is a .50 - 1.0 full-time equivalent (FTE) and are free of any formal corrective action for the prior 12- months are eligible for tuition assistance on the first of the month following six months of service. To qualify, the covered courses must begin after the employee has met the eligibility requirements. Additionally, employees who are approved to receive tuition assistance must remain in an eligible status for one year following the completion of all course work. Employees whose employment status drops below .50 FTE will be required to reimburse Atrius Health for any funds advanced or reimbursed.

Plan Benefits

The Tuition Assistance Plan covers tuition and mandatory fees related to the course, including lab fees, as follows:

- For full-time employees (.75 – 1.0 FTE), four courses per calendar year are covered at 80% of the cost for tuition and mandatory fees, up to an overall benefit of $5,000 per calendar year.
- For part-time employees (.50 up to .74 FTE), two courses per year are covered at 80% up to an overall benefit of $2,500 per calendar year.

Course Eligibility

Courses must be taken at an approved and accredited educational institution and must be offered over a period of at least 5 days from start date to end date. A full list of eligible institutions can be found on the tuition assistance self-service website. Online courses offered by these institutions are also covered by the plan.

The benefit is contingent upon employees remaining at Atrius Health for a period of one full year following the completion of the covered courses. Employees who terminate voluntarily prior to the end of this one-year period will be required to reimburse Atrius Health for the benefit to the educational institution. Employees who receive a Tuition Advance and do not successfully complete the course are also required to reimburse Atrius Health for the advanced funds.

To be covered, coursework must fall into one of the following categories:

1. Part of a course of study for an Associate of Arts or Sciences degree, a Bachelor of Arts of Sciences degree, or part of a formal postgraduate degree, Masters or Doctorate program
2. A certificate program of study which supports the employee's developmental goals and relates to the business of Atrius Health.

What's not covered

The Tuition Assistance Plan does not cover on-the job training programs that should be covered under a department's training budget. For example, any class that improves an employee's specific skill in performing his or her job is not covered under this plan. This includes all computer skill courses, such as courses in Microsoft Word or Microsoft Excel or Web applications, etc.

Grade/Proof of Completion Requirements

At the end of each course the employee must submit proof of the official grade report that clearly states that full credit/certification has been given, full payment has been received by the institution, and the following grade has been attained:

Undergraduate	C-
Graduate	B-
Pass/Fail	Pass
Certificate	Certificate of Completion

Proof of completion must be submitted no later than 60 days after the end of the course. Benefits will not be available if the employee fails to meet the minimum requirements stated above.

Applying for Benefits

To apply for benefits, see section "Reimbursement or Advance", which will guide you through the completion of forms such as the application and the Educational Development Plan. Voya will obtain necessary supervisor approval. Please allow up to two weeks for processing applications.

Payment Options

Employees may choose to receive tuition payment from the company as a Reimbursement or an Advance. Please allow 3 to 5 business days for payments to be processed after all required documentation and approvals have been received.

Reimbursement is available after the course is completed and if our tuition administrator receives all of the required documentation and signatures within 60 days of course completion. Advance payments are made directly to the employee before proof of satisfactory completion has been submitted. Advances will be processed within 30 days of the course start date. Advance payments require submission of a ***Promissory Note**** and all funds paid to the employee must be repaid by the employee to Atrius Health under the following conditions:

- Withdrawal from a course or changing a pre-approved course – you must notify Voya within 7 days and must return the advance to Atrius Health
- Failure to meet the minimum grade requirements
- Failure to submit proof of completion and payment within 60 days after course ends
- Termination of employment before the course end date

Atrius Health reserves the right to withdraw the Tuition Advance privilege to employees that do not meet these conditions.
*The Promissory Note will be sent to you via email from Voya once the required documentation and supervisory approval is received.

Required Documentation

- □ Tuition Assistance Application for each course (Available on the tuition assistance self-service website)
- □ Promissory Note (for Tuition Advance) Confirmation of course registration (for Tuition Advance)
- □ Educational Development Form (Available on the tuition assistance self-service website. Required once per calendar year.)
- □ Course Description (from an accredited school's catalog or website)
- □ Proof of Cost (for certificate program) or Cost per Credit (for degree program)
- □ Tuition Bill for degree program (including financial aid information, if applicable)
- □ Final Grade for degree program (report card or transcript)
- □ Certificate of Completion and/or Pass/Fail (for certificate program)

You must submit documentation within 60 days of the completion of the course. If you do not remain employed at Atrius Health for one full year after the last official day of the course(s), any benefit paid to you under this plan must be repaid to Atrius Health. Failure to meet this obligation will make you ineligible for rehire.

Reimbursement Process

Used For: Requesting approval for a completed course in which you want to be reimbursed OR requesting pre-approval for a course you plan to take.

Step 1: Confirm your educational institution is accredited.
Make sure the educational institution is on the list of accredited institutions by reviewing the Accredited Schools List. If the institution is not listed, the course is not eligible for reimbursement.

Step 2: Educational Development Plan
If you have not yet completed an Educational Development Plan, click HERE to complete the form. The Educational Development Plan needs to be completed once per calendar year and approved by your supervisor. After completing, email form to HASTuition@voya.com.

Voya will forward it to your supervisor for approval. If you have already submitted your Educational Development Plan, skip to Step 3.

Step 3: Tuition Reimbursement Request Form
Complete the Tuition Reimbursement Request form by clicking HERE. Please make sure to indicate on the form if you are submitting for reimbursement or for pre-approval. Note that you will have to attach the course description(s) with your application. Your application will not be processed without this documentation. Send completed application and course description(s) to HASTuition@voya.com Voya will notify you via email if the course(s) have been approved or not.

Step 4. Upload Required Documents
This step becomes available once you have received the approval email.
When you have completed and paid for the course, return to this page within 60 days of the course end date and click on the Voya login link HERE to upload the following:

1. Grade(s)/Proof of course completion
2. Proof of payment
3. Proof of cost (school's itemized bill or the tuition breakdown [to include cost per credit] from the school catalog or website)

IMPORTANT: Your payment will not be processed unless all three of these items are uploaded for each course. All documentation must be submitted within 60 days of the course end date in order to be eligible to receive the reimbursement.

Advance Process

This process involves two phases. Please see below for the applicable phase you are in for the advance process.

Phase 1: I am requesting a tuition advance for a class I will be taking.

A valuable benefit offered by Atrius Health is the ability to receive an advance of funds to pay for a course. Please note that **Tuition Advances are only available within 30 days of the course start date.**

Step 1:
Make sure the educational institution is on the list of accredited institutions. If the institution is not listed, the course is not eligible for reimbursement.

Step 2:
If you have not yet completed an Educational Development Plan, click HERE to complete and submit the electronic form. The Educational Development Plan needs to be completed once per calendar year and approved by your supervisor. After completing and submitting this electronic form, Voya will forward it to your supervisor for approval. If you have already submitted your Educational Development Plan, skip to Step 3.

Step 3:
Complete and submit the electronic Tuition Assistance Application form by clicking HERE. Please make sure to indicate on the form that you are submitting for an advance. Note that within the form you will need to upload your course description(s), proof of course registration for each course and proof of cost (school's itemized bill or the tuition breakdown [to include cost per credit] from the school catalog or website). Your application will not be processed without this documentation.

Voya will notify you via email if the course(s) have been approved for an advance. If approved, a Promissory Note will be attached to the email. You and your supervisor will need to sign and return it to HASTuition@voya.com. Once your signed Promissory Note has been received, the advance will be processed to pay directly to you via check mailed to your home address.

IMPORTANT: You must return to this web page within 60 days of your course end date to upload your grades / proof of course completion. Failure to do so will result in the advance needing to be repaid in full immediately.

Phase 2: I received a tuition advance for a course I have now completed and need to upload grades/proof of completion.

When you have completed the course, return to this page within 60 days of the course end date and upload grade(s)/proof of course completion through the Voya login HERE.

IMPORTANT: Grades/proof of course completion must be submitted within 60 days of the course end date. Failure to do so will result in the advance needing to be repaid in full immediately.

Health Account Solutions, including Health Savings Accounts, Flexible Spending Accounts, Commuter Benefits, Health Reimbursement Arrangements, and COBRA Administration offered by Voya Benefits Company, LLC (in New York, doing business as Voya BC, LLC). HSA custodial services provided by Voya Institutional Trust Company. For all other products, administration services provided in part by WEX Health, Inc.

This highlights some of the benefits of these accounts. If there is a discrepancy between this material and the plan documents, the plan documents will govern. Subject to any applicable agreements, Voya and WEX Health, Inc. reserve the right to amend or modify the services at any time.

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