

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, PhD, e t c .) as well as certain accredited 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 Training & Development prior to enrollment. No reimbursements will be provided for ineligible training programs. For more information, you may contact Training & Development at HS-T-D@ucdavis.edu or (916) 734-2676.

Employees may be reimbursed up to \$4,000 per calendar year (January – December) for tuition and materials/books for matriculated (degree-seeking), vocational and specialized certificate programs with a \$16,000 maximum lifetime benefit cap.

STEP is administered by the Human Resources Training & Development unit. Guidelines and reimbursements are subject to change at any time without notice. Reimbursements may also be impacted by budgetary and other considerations. For more information, you may contact Training & Development at HS-T-D@ucdavis.edu or (916) 734-2676.

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 application

WILL MY PROGRAM QUALIFY FOR STEP?

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

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- Prerequisite Courses (to qualify for reimbursement, proof of prerequisite requirement must be submitted)
- Specific Skilled Allied Health Vocational Certificate Programs (if unsure, check with Training 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.

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, NOW HOW DO I REQUEST A STEP REIMBURSEMENT?

You have a 60-day window after the completion of your coursework for that academic period (term, quarter, or semester) to submit a STEP request for reimbursement

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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 TuitionManager** online portal.

Your 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 for payment. Accounts Payable will reimburse you one of two ways; by direct deposit or paper check mailed to your address listed on file with the UCDH Payroll Office. If you have recently moved you are encouraged to verify your mailing address with the UCDH Payroll Office to incur additional delays. The reimbursement process may take up to six weeks.

IS STEP REIMBURSEMENT TAXABLE?

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

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

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- Your appointment type and/or position change to an ineligible classification (and 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)
- 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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For more information or questions about the Staff Tuition for Education Program, please contact Training & Development at HS-T-D@ucdavis.edu or (916) 734-2676.