

Study and Reimbursement of Fees Procedure

Section 1 - Introduction

- (1) The University is committed to encouraging and supporting staff in the pursuit of further studies and qualifications in line with the [University Strategic Plan](#).
- (2) This procedure outlines the approval process for staff to undertake an approved program of study and for the reimbursement of study fees.

Section 2 - Audience

- (3) Supervisors and eligible staff.

Section 3 - Procedure

Eligibility and Scope

- (4) Those eligible to apply for study leave and/or examination leave and/or reimbursement of fees are full-time or part-time staff members who are on a continuing or contingent contract or on a fixed term contract of at least 12 months.
- (5) Study leave and/or examination leave and/or reimbursement of study fees may be granted for study leading to a formal qualification relevant to the staff member's employment and of benefit to the University, including:
- enabling and bridging programs;
 - bachelor degrees;
 - post graduate study, higher degrees or approved awards;
 - study essential for staff member to gain recognition of existing overseas qualifications; and
 - other appropriate programs of study.
- (6) This procedure does not cover:
- University-initiated staff training and development such as short programs/prescribed courses and conferences;
 - Special Studies Program (SSP); and
 - Reimbursement of professional association/body fees.

(7) It is expected that staff will undertake study at the University of Newcastle where the University offers a relevant program. In circumstances where an appropriate program is not available through the University of Newcastle, including based on the mode of delivery, the Head of School/Director may approve study through another institution.

Approval to Undertake Study Procedure

- (8) Before commencing the proposed program of study the staff member will complete an application form for '[Application to Undertake a Program of Study With or Without Reimbursement](#)'. This form will give details of the study

program and an indication of the total cost and duration.

(9) The staff member will submit the completed application form to their supervisor who will consider the application and approve or decline the approved program of study. If the program of study is approved and the staff member is also applying for reimbursement of study fees, the supervisor will provide a recommendation to the Head of School/Director who will approve or decline the request for reimbursement.

(10) In considering a staff member's application to undertake a program of study, with or without reimbursement, the supervisor and Head of School/Director will take into account the following:-

- a. Relevance - The course of study must be considered relevant and appropriate to the staff member's current or likely future duties and responsibilities at the University. The course may be identified as a development opportunity through Performance Review and Development (PRD).
- b. Equitability - Equitability for all staff in the School/Unit in accessing the funds available for development within the School/ Unit budget. This includes consideration of the number of study programs the staff member has previously undertaken that have been supported by the University and the estimated total cost of the proposed program of study.
- c. Access to study/exam leave - Consideration should be given to staff coverage in cases where multiple staff from the same area have their course of study approved and will need to access study leave or exam leave simultaneously.
- d. Employment Provisions - Previously agreed employment arrangements, for example, traineeships where there has been a commitment made to support prescribed studies.
- e. Development - the development or progression opportunity this will provide the particular staff member.

(11) The initial approval will apply for the duration of the program of study, unless:-

- a. The staff member displays unsatisfactory conduct or service;
- b. The staff member is not progressing as planned through the program;
- c. The staff member transfers from their current Unit/School to another Unit/School; or
- d. Otherwise specified by the supervisor or Head of School/Director.

(12) Staff members who have approval to undertake an approved program of study will have access to study leave, examination leave, pre-examination leave and travel time as outlined in the University's Enterprise Agreements and shown below in Table A.

Table A

Type of Leave	Period of Leave
Study leave	Up to a maximum of 35 hours per semester or trimester in addition to any period of approved examination leave.
Examination leave	The actual duration of the examination.
Examination Leave for a Take Home Examination	The actual duration of the examination up to a maximum of 4 hours for each examination.
Pre-examination leave	An amount of time equal to the actual duration of the examination, to be taken during ordinary working hours prior to the examination occurring, in addition to examination leave and travel time.
Travel Time	The time required to travel from a staff member's usual place of work to attend an examination where such travel can only be undertaken during ordinary working hours.

(13) In general, staff members working full-time and undertaking at least two subjects will be able to access up to 35 hours study leave per trimester/semester, in addition to any period of approved examination leave.

(14) In general, staff members working full-time and undertaking one subject will be able to access up to 17.5 hours of study leave per trimester/semester, in addition to any period of approved examination leave.

(15) In general, staff members working part-time will be able to access study leave on a pro-rata basis based on their full-time equivalent and the numbers of subjects being undertaken.

Rate of Reimbursement and Conditions

(16) The rate of reimbursement is 50% of the individual tuition course fees.

(17) Reimbursement of any fee or charge will only be made on production of proof of the successful completion of each course/subject, such as an official transcript or grades.

(18) To avoid unnecessary cost to the University, staff are expected to apply for credit for previous study where applicable.

(19) In exceptional circumstances, a Pro Vice-Chancellor/Head of Division may approve a higher proportion of reimbursement if the study provides significant and immediate benefit to the organisation.

Reimbursement Procedure

(20) Once a course has been successfully completed, an application for reimbursement of fees may be made by completing the ['Application for Reimbursement of Study Fees'](#) form.

(21) Application forms for reimbursement must be accompanied by evidence of payment or deferral of payment of study fees and proof of the successful completion of each course/subject such as an official transcript of grades.

(22) Where applicable, staff may choose to pay their study fees up-front or defer payment through HECS-HELP and FEE-HELP.

(23) Applications must be made in the calendar year the course is undertaken.

(24) A new [Application for Reimbursement of Study Fees](#) application form must be lodged after each semester/trimester for which the reimbursement is sought and approved by the Head of School/Director.

(25) The [Application for Reimbursement of Study Fees](#) application form is to be returned to the staff member after the Head of School/Director has approved the application.

(26) The staff member must claim reimbursement through Freedom Expense Management System by:

- a. Raising a Cash Expense claim, Reimbursement of Study Fees;
- b. Attaching the scanned and approved [Application for Reimbursement of Study Fees](#) application form (as 1 image document) to the Freedom expense claim for approval.

Fringe Benefits Tax (FBT) Implication

(27) Reimbursement costs can attract Fringe Benefits Tax (FBT).

(28) FBT can apply to any reimbursement of HECS fees paid to staff. Other course fees are exempt from FBT as long as the staff member could have claimed the expense as an income tax deduction. For any transaction subject to FBT, the cost of the benefit effectively doubles and could have personal taxation implications.

(29) Postgraduate Education Loan Scheme (PELS) reimbursements, to the extent they relate to a staff member's work and would otherwise be deductible in a personal income tax return, are not subject to FBT.

(30) FBT will be charged to the relevant College/Division on a regular basis, in addition to the reimbursement. The correct detail code must be used to ensure the transaction is identified by Financial Services as being subject to FBT. Please contact finserv-taxation@newcastle.edu.au if you require further information.

Review

(31) A staff member may seek a review of a decision regarding study leave and/or examination leave and/or reimbursement of fees from the appropriate Deputy Vice-Chancellor, or nominee.

Status and Details

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Responsible Executive	Martin Sainsbury Chief People and Culture Officer martin.sainsbury@newcastle.edu.au
Enquiries Contact	Human Resource Services

Glossary Terms and Definitions

"University" - The University of Newcastle, a body corporate established under sections 4 and 5 of the University of Newcastle Act 1989.

"Approved program of study" - A program that has been approved by the University which gives a staff member access to study leave and/or examination leave.

"Award" - When referring to a University qualification, this term means an academic qualification approved by Academic Senate that is conferred when a student has met the relevant program requirements. For all other uses of this term, the generic definition applies.

"Course" - When referring to a course offered by the University, a course is a set of learning activities or learning opportunities with defined, assessed and recorded learning outcomes. A course will be identified by an alphanumeric course code and course title. Course types include core courses, compulsory courses, directed courses, capstone courses and electives. For all other uses of this term, the generic definition applies.

"Credit" - When referring to course credit, credit is the recognition of equivalence in content and learning outcomes between different types of learning and/or qualifications. Credit can reduce the amount of learning required to achieve a qualification. For all other uses of this term, the generic definition applies.

"School" - An organisational unit forming part of a College or Division, responsible for offering a particular course.

"Staff" - Means a person who was at the relevant time employed by the University and includes professional and academic staff of the University, by contract or ongoing, as well as conjoint staff but does not include visitors to the University.

"Supervisor" - Staff members with direct supervisory responsibility for other staff within the workplace (a Supervisor may also be member of Senior Management, with duties as an Officer as defined in the Work Health and Safety Act 2011, or any replacing legislation).

"College" - An organisational unit established within the University by the Council.