

Study and Reimbursement of Fees Procedure

Section 1 - Introduction

(1) The University of Newcastle (University) is committed to encouraging and supporting staff in the pursuit of further studies and qualifications to assist them in gaining the skills and expertise required to deliver on the University's core business and [strategic plan](#).

(2) This procedure outlines the process for staff to seek approval:

- a. to undertake a course or program of study that leads to a formal qualification; and
- b. for the reimbursement of associated study fees.

Section 2 - Audience

(3) Supervisors and staff.

Section 3 - Scope

(4) This procedure applies to courses or programs of study that lead to formal qualifications that are relevant and appropriate to the staff member's current or likely future duties and responsibilities at the University, and are of benefit to the University.

(5) This procedure does not apply to:

- a. University-initiated staff training and development such as short programs/prescribed courses, continuing professional development (cpd) or similar, and conferences;
- b. the University's [Special Studies Program](#) (SSP); or
- c. the reimbursement of professional association/body fees.

Section 4 - Procedure

Eligibility

(6) Eligibility for study leave, examination leave and reimbursement of associated fees will be in accordance with the relevant [Enterprise Agreement](#).

(7) Staff should seek to undertake study at the University of Newcastle where a relevant program is offered. In circumstances where a relevant program is not available through the University of Newcastle, including because of the mode of delivery available, study through another institution may be approved.

Approval to Undertake Study

(8) Before commencing the proposed program of study the staff member must complete an [Application to Undertake](#)

[a Program of Study With or Without Reimbursement.](#)

(9) The staff member must submit the completed [Application to Undertake a Program of Study With or Without Reimbursement](#) to a relevant authorised delegate, via their supervisor (if relevant), for it to be considered for approval.

(10) In determining a staff member's application to undertake a program of study, with or without reimbursement, the relevant authorised delegate will consider the following:

- a. [enterprise agreement](#) provisions – the application must meet the requirements of the relevant [enterprise agreement](#);
- b. relevance – the course of study must be relevant and appropriate to the staff member's current or likely future duties and responsibilities at the University, or be of benefit to the University;
- c. budget – whether the School or business unit has sufficient budget available to cover the reimbursement of fees;
- d. equity – equity for all staff in the School/business unit in accessing the funds available for development within the School or business 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 as outlined in the [Application to Undertake a Program of Study With or Without Reimbursement](#);
- e. access to study/exam leave – consideration should be given to staff coverage that may be required where multiple staff from the same area have their course of study approved and will need to access study leave or exam leave simultaneously;
- f. employment provisions – previously agreed employment arrangements (for example traineeships) where a commitment has been made to support prescribed studies; and
- g. development – the development or progression opportunity that the study will provide the particular staff member as discussed during the Performance Review and Development (PRD) process.

(11) An approval granted by the relevant authorised delegate 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 ceases employment with the University;
- d. the staff member transfers from their current Unit/School to another Unit/School; or
- e. as otherwise specified by the supervisor or Head of School/Director.

(12) Once approved, the staff member will:

- a. retain the approved form; and
- b. provide their relevant School/Unit and Human Resource Services with a copy of the approval.

(13) Human Resource Services will save a copy of the approval on the staff member's file.

(14) 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 relevant [University Enterprise Agreement](#).

Rate of Fee Reimbursement and Conditions

(15) The rate of reimbursement is up to 50% of the individual tuition course fees for study at the University of Newcastle, or up to 25% for study at another institution.

(16) Staff must be employed by the University of Newcastle to claim reimbursement of study 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 relevant authorised delegate may approve a higher proportion of reimbursement of fees if the study provides significant and immediate benefit to the organisation.

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

Claiming a Reimbursement of Fees

(21) Once a course/subject has been successfully completed, an [Application for Reimbursement of Study Fees](#) form should be completed by the staff member. Where possible this should be made in the calendar year in which the course is undertaken.

(22) 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, must be attached to the form.

(23) The application form must be provided to the relevant authorised delegate for approval. The [Application for Reimbursement of Study Fees](#) form is to be returned to the staff member after the relevant authorised delegate has approved the application.

(24) Once the [Application for Reimbursement of Study Fees](#) form is approved, the staff member must claim reimbursement through the FlexiPurchase Expense Management System by:

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

Fringe Benefits Tax (FBT) Implication

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

(26) 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.

(27) 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

(28) A staff member may seek a review of a decision regarding the approval to study and reimbursement of fees in accordance with any relevant provisions of the applicable [Enterprise Agreement](#) or employment contract.

Status and Details

Status	Current
Effective Date	14th February 2022
Review Date	14th February 2025
Approval Authority	Chief People and Culture Officer
Approval Date	6th December 2021
Expiry Date	Not Applicable
Responsible Executive	Martin Sainsbury Chief People and Culture Officer martin.sainsbury@newcastle.edu.au
Enquiries Contact	Human Resource Client 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.

"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).

"Unit" - When referring to an academic unit, unit means the proportional amount of academic credit allotted to a course. This term is used to define the requirements for a program award of the University and indicate a student's enrolment load. For all other uses of this term, the generic definition applies.

"Continuing professional development (CPD)" - Means formal learning activities which are required to be undertaken by professionals to maintain their ongoing industry accreditation or registration.

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