



# INTRODUCTION

The 1199SEIU League Training and Upgrading Fund (TUF) Training Benefits Overview (TBO) is intended primarily for TUF (the Fund) staff and others, such as Human Resources staff at Contributing Employers, and Union officers seeking to understand the programs provided by TUF and the policies and procedures regarding benefit programs. Participants can find descriptions of the many TUF programs and services mentioned in this overview by going to the **MyTEF** Student Portal (www.1199SEIUBenefits.org/MyTEF), visiting a Fund location or contacting a Fund staff person by calling (844) TEF-1199.

Please note that the Board of Trustees reserves the right, in their sole discretion, to change or discontinue benefits or programs at any time.

This Training Benefit Overview codifies, incorporates and/or replaces all training benefits overviews and Trustee resolutions prior to December 31, 2024.

# **TABLE OF CONTENTS**

INTRODUCTION	<u> 1</u>
Brief History and Structure	3
<u>Funding</u>	3
Program Administration	3
Important Terms	4
Fund Locations	5
PARTICIPANT ELIGIBILITY	6
Overview	6
General Eligibility Requirements	7
Track A Programs and Services - General Eligibility	7
Track B Programs and Services - General Eligibility	7
Breaks in Employment Service - Impact on Eligibility	8
Laid-off Participants	9
Employer Delinquency - Suspension of Benefits	9
Accessing Information	9
PROGRAMS AND SERVICES	<u>10</u>
Education and Career Guidance	10
Pre-College Programs and Services	<u>11</u>
College-Level Programs and Services	13
Health Careers College Core Curriculum (HC4)	13
Tuition Assistance Benefits: Tuition Vouchers and Tuition Reimbursement	13
Application Requirements for Tuition Assistance	18
Professional Continuing Education	18
Occupational Certificate Training	20
Paid Release Time and Service Payback Offerings	21
PROCEDURES, RIGHTS AND DISCLOSURES	24

# **Brief History and Structure**

In 1969, 1199SEIU United Healthcare Workers East (1199SEIU) and the League of Voluntary Hospitals and Homes of New York (the League) broke new ground in labor-management partnerships by establishing the 1199SEIU Training and Upgrading Fund (TUF) to provide education, training and career advancement opportunities through the collective bargaining process to healthcare workers who previously lacked access to career pathways and social mobility.

In the years since its inception, TUF has expanded beyond New York City and now operates throughout New York State, Massachusetts, New Jersey, Maryland, the District of Columbia and Florida. TUF is a nationally recognized labor-management workforce development organization that provides education, training and upgrading opportunities to more than 275,000 eligible 1199SEIU employees, while working to fill health industry labor shortages.

A Board of Trustees (Trustees) composed of an equal number of Union and Employer representatives oversees TUF. The Trustees exercise fiduciary responsibility as managers of TUF's assets and are charged with determining the types of benefits provided and the rules and procedures regarding them. The Trustees have delegated responsibility for Fund administration to the Executive Director and her staff.

# **Funding**

TUF is funded through collectively bargained Employer contributions. In addition, TUF pursues and receives grants, including public funds from various levels of government and private foundations, to augment the core funding provided through negotiations. Collectively bargained funds are subject to the federal Employee Retirement Income Security Act (ERISA), which sets standards for managing and administering employee benefit plans, to ensure that rules and procedures are applied uniformly to all Participants. Some grant funds may not be subject to ERISA. Collective bargaining assets cannot be used to subsidize non-Participant participation in any programs, but grant funding may be used to subsidize the participation of Participants in collective bargaining, grants or other programs.

# **Program Administration**

The Executive Director and her staff administer TUF in accordance with the overarching guidelines and procedures established by the Trustees. Staff are responsible for both long-term planning and the day-to-day operations of TUF.

# **Important Terms**

The TBO references several terms that are important to understanding and navigating the benefit structure. Some of these include:

- Application Intake Period: Dates by, or periods within, which Participants must submit an application/request to TUF to access programs, benefits and services.
- Calendar Year: The 12-month period beginning January 1 and ending December 31.
- Collective Bargaining Agreement: (CBA)
- Contributing Employer or Employer: (1) An Employer that has a Collective Bargaining Agreement with 1199SEIU United Healthcare Workers East, or one of its affiliates, that provides for regular monthly payments in an amount specified by the Trustees to the 1199SEIU League Training and Upgrading Fund on behalf of the Employees covered by the agreement for all benefits in this Training Benefits Overview. (2) 1199SEIU United Healthcare Workers East, its affiliates, TUF or any other Employer accepted as a contributor by the Trustees and its affiliated and related Funds that are obligated to make regular monthly payments in an amount specified by the Trustees to TUF on behalf of its Employees.
- Covered Employment: Employment for which a Participant's Employer makes contributions to the 1199SEIU League Training and Upgrading Fund on their behalf pursuant to a Collective Bargaining Agreement or other agreement accepted by the Board of Trustees.
- **Employee:** An individual engaged in Covered Employment.
- Fund or TUF: The 1199SEIU League Training and Upgrading Fund, whose principal office is at 498 Seventh Avenue, New York, NY 10018 through which education and training programs and benefits are provided.
- Participant: An Employee of a TUF Contributing Employer; who is or may become eligible to receive or is receiving a benefit of any type from TUF. In this document, "Participant" may refer an individual who is an applicant for TUF programs, benefits and services, or a student or Participant enrolled in TUF programs.
- Wage Class: The Wage Classification, assigned by the 1199SEIU National Benefit Fund (NBF), is used to determine the specific level of benefits for which Participants are entitled.

# **Fund Locations**

New York Metro Area, New Jersey, and Hudson County		
Manhattan 498 Seventh Avenue New York, NY 10018	Albany 155 Washington Avenue Albany, NY 12210	
Bronx 2501 Grand Concourse Boulevard Bronx, NY 10468	Long Island 100 Duffy Avenue Hicksville, NY 11801	
Brooklyn 25 Elm Place Brooklyn, NY 11201	White Plains 99 Church Street, 4th Floor White Plains, NY 10601	
Staten Island 790 Port Richmond Avenue Staten Island, NY 10302		
Phone number: (844) TEF-1199		



# PARTICIPANT ELIGIBILITY

# **Overview**

The 1199SEIU League Training and Upgrading Fund (TUF) offers an array of education and training opportunities, including tuition assistance for those pursuing higher education, professional continuing education reimbursement, career counseling and numerous programs aimed at enhancing skills, preparing for college and attaining occupational certification.

Descriptions and specific enrollment details for all benefits, services and programs are made available widely to potential Participants and Employers through websites, leaflets, outreach efforts and information sessions. Participants who want to ascertain their eligibility and learn more about TUF can go to www.1199SEIUBenefits.org/MyTEF, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **General Eligibility Requirements**

In terms of general eligibility, TUF programs and services fall into two categories, Track A and Track B. Within these tracks, some programs may have additional academic and program requirements for Participants to enroll.

- Track A programs and services are most commonly foundational and pre-college programs, workshops, information sessions and prep courses.
- Track B programs and services tend to be in the areas of professional continuing education, college-level programs and courses, and occupational certificates.

## Track A Programs and Services - General Eligibility

To be eligible to access Track A programs and services, Participants must meet the employment thresholds listed below prior to the start of their course, semester, program or training activity.

- Be actively and continuously employed by a Contributing Employer that is up to date in making contributions to TUF on their behalf.
- In cases where an Employer is newly organized into 1199SEIU, and TUF is negotiated into the Collective Bargaining Agreement (CBA), Participants are immediately qualified for education benefits if they currently work for the Employer and meet all other employment requirements prior to the ratification of the CBA.

## **Track B Programs and Services - General Eligibility**

To be eligible to access Track B programs and services, Participants must meet the employment thresholds listed below prior to the start of their course, semester, program or training activity. This employment must continue throughout the course of their study.

- Be actively and continuously employed for at least one full year by a Contributing Employer that is up to date in making contributions to TUF on their behalf.
- Be a regular, permanent Employee in a bargaining unit position who successfully completed the probation period specific to their Employer. Temporary/per diem Employees are not eligible.
- Have an eligibility status of either Wage Class I or Wage Class II, except where otherwise noted, as defined by the 1199SEIU National Benefit Fund (NBF) Summary Plan Description, or the equivalent for Employees who do not participate in NBF (Employees may locate their Wage Class information at <a href="www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>, by visiting a Fund location or contacting a Fund staff person by calling [844] TEF-1199).
- In cases where an Employer is newly organized into 1199SEIU, and TUF is negotiated into the CBA, applicants are immediately qualified for education benefits if they have worked for

- the Employer for at least one full year and met all other employment requirements prior to the ratification of the CBA.
- Participants may receive benefits if they are on an Employer-approved educational leave of absence for participation in certain TUF programs. Approval by the TUF Executive Director, or their designee, is required.

**Note:** In the case of newly organized bargaining units, the one-year eligibility requirement is based on the Participant's date of hire with that TUF Contributing Employer, and not the date of the CBA or contract.

# **Breaks in Employment Service - Impact on Eligibility**

# (Workers' Compensation, disability, Paid Family Leave, Family and Medical Leave of Absence, military service, approved leaves)

If a Participant stops working in Covered Employment and then begins working again in Covered Employment, or returns to work for a Contributing Employer after the last day of an employment leave:

- Within 45 days, the Participant will have no break in their eligibility.
- After 45 days but within six months, the Participant's eligibility may resume 30 days after they have returned to Covered Employment.
- After six months, the Participant's eligibility may resume 90 days after they have returned to Covered Employment.

The Participant's Employer must inform the NBF Eligibility Department or TUF that they have returned to work in order for their coverage to continue.

A Participant working at the beginning of the semester who goes on leave may complete the current course work and is eligible to receive tuition reimbursement for that semester. They must meet all TUF academic requirements and apply for tuition reimbursement during the appropriate Application Intake Period.

If a Participant is out on leave prior to the start of the semester, they are not eligible for a tuition voucher. The Participant must return to work for at least 30 days of the semester during which they are on leave to receive tuition reimbursement for that semester. They must have returned to work at the time they apply for the next semester's tuition voucher.

In all the above instances, the Participant must meet all TUF academic requirements and apply for tuition reimbursement during the appropriate Application Intake Period.

### **Laid-off Participants**

Participants receiving tuition assistance benefits who are laid off from a job classification covered by a CBA *may* be eligible for some continued benefits.

- TUF Participants who are laid off while enrolled in a program may complete the current semester if approved by the Executive Director.
- In instances where the Executive Director has expressly provided approval, Participants who
  have been laid off may be eligible for benefits for no more than two years from the effective
  date of layoff if they waive eligibility for benefits under the 1199SEIU League Job Security
  Fund (JSF).

## **Employer Delinquency - Suspension of Benefits**

## **Accessing Information**

Participants can access detailed information on TUF programs, benefits and services. This information may include eligibility, their Wage Class status, program requirements, application processes, benefit amounts, required documents, etc.

Participants may obtain this information by:

- Logging on to the MyTEF Student Portal at <u>www.1199SEIUBenefits.org/MyTEF</u>
- Visiting the Fund's website at www.1199SEIUBenefits.org/training/
- Calling the Fund's Call Center at (844) TEF-1199
- Visiting a Fund location to speak with a Fund staff person (see the Fund Locations section on page 7)

If benefits are suspended by the Collections Committee of the Board of Trustees, affected Employees are ineligible for Fund benefits until the delinquency is cured. Those Employees participating in a program at the time of the benefit suspension may complete their current semester, at the discretion of the Executive Director.



# **PROGRAMS AND SERVICES**

# **Education and Career Guidance**

General Eligibility Track A (See, General Eligibility Requirements section on pages 8 – 10)

TUF offers career and academic counseling services to help Participants develop career maps and identify the steps needed to achieve their goals. TUF counselors with expertise in foundational, higher education, and occupational and technical study are available to work with Participants in applying useful skills and tools toward their academic success. Guidance services include programs such as:

- Tuition Assistance Information Session
- Career Planning Workshop
- Exit to Employment Workshop
- Upgrade Strategies Workshop
- Resume Writing and Interview Skills Programs, with interactive support

For more information about Education and Career Guidance Services, go to <a href="https://www.1199SEIUBenefits.gog/MyTEF">www.1199SEIUBenefits.gog/MyTEF</a>, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **Pre-College Programs and Services**

General Eligibility Track A (See, General Eligibility Requirements section on pages 8 - 10)

TUF offers an extensive range of pre-college programs and services that Participants can access before reaching their one-year anniversary of employment. These programs and services include but may not be limited to:

- Tutoring and educational support
- English for Speakers of Other Languages (ESOL)
- High School Equivalency Program
- Computer courses and digital literacy
- College Readiness Prep Academy

### **Tutoring and Educational Support**

TUF offers educational support, tutoring services, workshops and access to a variety of academic resources for Participants enrolled in certain TUF programs. Tutoring and educational support may be offered online and in-person.

## **English for Speakers of Other Languages (ESOL)**

TUF offers progressive levels of instruction to improve English language speaking, reading and writing skills. In turn, this helps Participants in their healthcare jobs and future academic studies. Instructional levels range from beginner to advanced.

# **High School Equivalency Program**

The High School Equivalency Program helps Participants earn their equivalency diploma issued by the New York State Education Department. The program has two pathways: (1) Test Assessing Secondary Completion (TASC), which has nationally replaced the GED, or (2) National External Diploma Program (NEDP), which is an independent study program. All study helps Participants prepare in the areas of reading comprehension, writing and mathematics. Depending on the chosen pathway, instruction is also provided in oral communication, modern workplace skills, financial literacy, geography, history and scientific history.

## **Computer Courses and Digital Literacy**

The course offerings in this program review basic technology concepts, such as hardware, software, operating systems, the Internet and email. Participants learn basic Microsoft Word skills, including formatting, using spell-check and creating tables, as well as intermediate Microsoft Excel skills,

including working with spreadsheets and creating reports. They also develop understanding of Internet navigation using mobile devices.

### **College Preparatory Program**

The College Preparatory Program prepares Participants to successfully perform college-level work. Instruction and support are provided for college academics, time management, test-taking strategies, etc. The program offers strong academic foundations to prepare for high school completion, as well as future studies in college and/or continuing education courses. Participants improve their skills in reading comprehension, essay writing and math. Science is integrated in every course level. Participants receive extensive support services to help them succeed.

For more information about Pre-College Programs and Services, go to <a href="https://www.1199SEIUBenefits.org/">www.1199SEIUBenefits.org/</a> MyTEF, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **Programs for New Immigrants**

General Eligibility (See, General Eligibility Requirements section on pages 8 – 10)

Participants who are new immigrants can access programs and services that assist with the United States Citizenship and Immigration Services (USCIS) immigration and legalization process, including:

- USCIS Exam Preparation
- U.S. Citizenship Fee Application Reimbursement

# **General Eligibility: Track A**

#### **USCIS Exam Preparation**

The 1199SEIU Citizenship Program is jointly administered by the 1199SEIU Training and Employment Funds and the 1199SEIU Benefit and Pension Funds. The purpose of this free program is to help Participants and their eligible family members with the immigration and naturalization process to become U.S. citizens. The program offers citizenship refresher courses, civics and history prep courses, citizenship for English language learners courses and legal counseling.

## General Eligibility: Track B

#### **U.S. Citizenship Application Fee Reimbursement**

TUF offers Participants a partial reimbursement benefit for the USCIS citizenship application fee. Requests for reimbursement must be submitted to the Fund no later than one year from the date on the USCIS Form I-797 Notice of Action Receipt.

For more information about Programs for New Immigrants, go to <a href="www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **College-Level Programs and Services**

General Eligibility Track B (See, General Eligibility Requirements section on pages 8 – 10)

TUF provides training and financial assistance to eligible Participants pursuing college degrees and college credit-bearing certificates in healthcare and job-related fields of study. These include:

- Health Careers College Core Curriculum (HC4)
- Tuition voucher
- Tuition reimbursement

## **Health Careers College Core Curriculum (HC4)**

HC4 supports Participants with little or no foundation in college classes who are seeking allied health degrees. The program provides the opportunity to take prerequisite courses with a cohort of 1199SEIU TEF Participants. HC4 is offered through specific colleges that partner with TUF, and all courses are offered for credit. HC4 Participants typically earn 12 to 40 credits through the program before transitioning to coursework in their chosen field. Participants are required to fulfill the enrollment requirements of the sponsoring HC4 institution to participate.

For more information about HC4, go to <u>www.1199SEIUBenefits.org/MyTEF</u>, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

#### **Tuition Assistance Benefits: Tuition Vouchers and Tuition Reimbursement**

TUF offers eligible Participants financial assistance as they pursue educational advancement, training opportunities and occupational enhancements. Tuition assistance is provided to eligible Employees pursuing higher education programs, which

- Can lead to a degree that can be used for advancement with their Employer;
- Can lead to advancement in healthcare or related fields; or
- Are related to current employment.

TUF provides tuition assistance through two options: **Tuition Vouchers**, which allow Participants to take courses at select schools without paying up-front costs; or **Tuition Reimbursement**, through which Participants are reimbursed after successfully completing required, accredited college courses.

#### **Tuition Vouchers**

TUF provides prepaid tuition vouchers for Fund-approved study at City University of New York (CUNY) colleges, select State University of New York (SUNY) colleges, Monroe College and select Touro University colleges. Current listings of tuition voucher partners may be viewed in the MyTEF Student Portal at www.1199SEIUBenefits.org/MyTEF.

#### **Tuition Reimbursement**

TUF reimburses approved costs paid for Fund-approved study at accredited colleges and universities. In some cases, there are specific programs and schools that TUF does not support. Current information may be viewed in the MyTEF Student Portal at www.1199SEIUBenefits.org/MyTEF.

Below are TEF's education benefit levels, effective September 2024. These are subject to change and will be updated annually.

**Undergraduate Standard:** A maximum of \$4,160 per semester, \$8,320 per Calendar Year if the Participant is enrolled in an undergraduate program. This is the equivalent of 12 credits per semester plus the student fees at CUNY. Program of study must be health- or work-related. Some GPA restrictions may apply.

Graduate Standard: A maximum of \$6,512 per semester, \$12,304 per Calendar Year if the Participant is enrolled in a graduate program. Also the equivalent of 12 credits and student fees at CUNY and the same restrictions apply.

Higher tuition benefit amounts are available for occupations with workforce shortages:

Shortage Area Cap (undergraduate or graduate): A maximum of \$8,670 per semester, \$17,340 per Calendar Year if the Participant is enrolled in an occupational shortage program at the undergraduate or graduate level. Participants must be accepted and enrolled in the program of study and have completed prerequisites. GPA restrictions apply.

The programs of study deemed shortage areas are listed below, effective September 2024. This list is updated annually.

#### **Undergraduate Shortage Programs**

- Clinical Lab Science (AAS, BS)
- Diagnostic Sonography (AAS, BS)
- Health Information Management (AAS, BS)
- Nursing (AAS-BSN, BSN)
- Occupational Therapy (AAS, BS)
- Pharmaceutical Science (BS)

- Physical Therapy (AAS)
- Radiological Technology (AAS, BS)
- Respiratory Therapy (AAS, BS)
- Surgical Technology (AAS)

#### **Graduate Shortage Programs**

- Clinical Laboratory Science (MS)
- Health Informatics/Management (MS)
- Nurse Practitioner (MS, DNP)
- Occupational Therapy (MS, OTD)
- Pharmacy (PharmD)
- Physician Assistant (MS/PhD)
- Physical Therapy (MPT, DPT)

#### **Occupational Certificates:**

All Participants receive \$750 per year for continuing education, professional development or certificate programs, like Patient Care Technician (PCT).

In a few occupations, the Trustees approved benefit amounts above the standard rate. These are:

- Credentialed Alcoholism and Substance Abuse Counselor (CASAC): \$3,300
- Emergency Medical Services (EMTS and Paramedics): \$4,200
- Heating, Ventilating and Air Conditioning (HVAC): \$3,200
- Licensed Practical Nursing: \$11,000
- Medical Coding: \$1,500

Participants interested in education or training can go to the link below, create an account and read more about the programs or schedule an appointment with one of our academic counselors. <a href="https://www.1199SEIUBenefits.org/training/">www.1199SEIUBenefits.org/training/</a>

# A Special Note About Certain Shortage Titles Available Through the Career Pathways Training Program

Effective June 29, 2024, the State of New York, through the Career Pathways Training (CPT) Program, is offering tuition and related benefits for students in certain identified shortage titles. The Center for Healthcare Workforce Development (CHWD), an organization administered alongside TUF, has a contract to administer the CPT Program, which requires students to agree to a three-year service commitment.

Therefore, effective June 29, 2024, and continuing through the length of the CPT contract, the TUF Trustees passed a resolution providing that TUF will not offer tuition reimbursement benefits related to the CPT Shortage titles. As a result, to access tuition assistance programs relating to CPT shortage titles, Participants may submit an application to CHWD to participate in the CPT Program. However, the Executive Director is authorized to make exceptions for those who cannot meet the CPT criteria.

The shortage titles for which Participants can only obtain tuition and other assistance through the CPT Program are:

- Associate's degree in nursing
- Bachelor's degree in nursing
- Certified Pharmacy Technician
- Credentialed Alcohol and Substance Abuse Counselor (CASAC)
- Licensed Mental Health Counselor
- Licensed Practical Nurse
- Nurse Practitioner
- Physician Assistant
- Master of Social Work
- Medical Assistant
- Respiratory Therapist

For further information, go to www.1199SEIUBenefits.org/MyTEF.

#### **Taxable Benefits**

Participants may have to pay state, local and federal taxes on certain education and training benefits. Participants who receive benefits that cumulatively exceed \$5,250 within a single tax year will receive a W-2 tax form for the amount in excess of \$5,250 in accordance with U.S. and state revenue department guidelines. That amount may be taxed as wages. Participants with questions should consult with a tax advisor.

## **Program of Study Requirements for Tuition Assistance Benefits**

Participants are expected to comply with all educational policies and standards applicable to the degree- or certificate-granting school or program in which they are enrolled.

Participants must satisfy all college entrance requirements to enroll and matriculate. Some students may require remedial coursework before being able to enroll in credit-bearing coursework. TUF does

not pay for developmental or remedial courses at colleges. However, TUF directly provides classes necessary to bring students to enrollment level. See more relevant information, on page xx.

#### **Matriculation**

Participants must be accepted into an accredited college or university and satisfy all entrance requirements. Students are expected to matriculate into their Fund-approved program.

## **Declaring a Major**

Students must declare a major before earning more than 18 credits. In cases where prerequisite courses must be completed before they can declare their major, students must establish their degree goal with TUF staff and continue to take courses required for the degree goal. If, after completing the prerequisite courses, the student is not accepted into the degree program, they must meet with TUF staff to obtain approval for a change of their intended major.

#### **Course Grades**

Tuition assistance is provided to eligible Participants for credit-bearing courses that satisfy program requirements leading to an undergraduate or graduate degree. There are minimum course grade requirements for both tuition voucher and tuition reimbursement Participants. **TUF will pay for an approved course only once.** 

Participants will not receive tuition reimbursement for courses that fall below the TUF minimum grade requirement. Tuition voucher Participants must reimburse TUF for any monies paid to their school for courses where they later fell below the TUF minimum grade requirement.

Tuition voucher Participants whose overall grade point average (GPA) falls below 2.0 in an undergraduate degree program and below 3.0 in a graduate degree program, as applicable, may not receive a voucher again until the issue is remedied. During the period of ineligibility, the Participant may apply for tuition reimbursement, provided that all eligibility requirements, program application procedures and deadlines are met.

#### **Academic Ladder**

TUF Participants may apply for tuition assistance for progressive degrees (e.g., AAS to BSN, BSN to MSN, BA to MA, etc.). If TUF already supported the Participant's degree program, the Participant may not apply for tuition assistance for an additional program at that same degree level. In the event a Participant cannot find employment or achieve an employment upgrade because of changes in the labor market conditions in the field related to the TUF-supported degree program, the Participant may appeal to the Executive Director to approve a new application for another degree program.

### **Doctoral Degrees in Healthcare**

TUF supports Participants pursuing doctoral degrees in healthcare- or job-related fields. Tuition assistance is provided for doctoral degrees. The benefit will cover one dissertation course for the entire doctoral program.

# **Application Requirements for Tuition Assistance**

Participants enrolled in undergraduate programs are required to show proof of having applied for financial aid through the Free Application for Federal Student Aid (FAFSA) prior to the start of their semester. Tuition reimbursements are remitted to Participants, while tuition voucher payments are made to colleges after the deduction of all awarded financial aid, excluding loans, aid awarded solely based on academic merit and some awards related to national crises. It is the Participants' responsibility to provide proof of awards being nondeductible.

Participants must submit tuition voucher or tuition reimbursement applications within the designated Application Intake Period. Late applications are not accepted. Applications with all required documents should be submitted via **MyTEF**: <a href="www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>. Participants who require assistance in completing the application should visit a Fund location. A new application must be submitted each semester.

Participants are required to present accurate and complete information on all application forms, transcripts or any other program-related documents. Benefits will be denied if a form or related documentation has been falsified or altered in any way.

For more information about Tuition Assistance Benefits, go to <a href="www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **Professional Continuing Education**

General Eligibility Track B (See, General Eligibility Requirements section on pages 8 – 10)

TUF provides eligible Participants with many options to meet the continuing education requirements of their healthcare profession. The Professional Continuing Education programs and benefits include:

- Professional Development Courses
- Fund-Sponsored Seminars
- Continuing Education Reimbursement

To be eligible to access the TUF Professional Continuing Education benefits, Participants must meet all eligibility requirements prior to the start of their continuing education activity, course or program.

### **Professional Development Courses**

TUF provides thousands of hours of courses and webinars enabling Participants to advance their knowledge, fulfill continuing education requirements, prepare for certification exams and enhance patient-care skills. These services are made possible through a partnership with a leading provider of continuing education programs and training for healthcare professionals. TUF Participants receive instant access to thousands of courses, including award-winning ANCC-accredited courses written by top healthcare experts. Participants can access Certification Review, including more than 700 accredited courses designed to help healthcare workers (including nurses) successfully pass their licensure and certification exam. They can also access Focused CE Series and enjoy discussions with nationally recognized experts, self-study readings and a forum to connect with their instructors and classmates, all designed by industry leaders.

Course offerings can be accessed through MyTEF: <a href="www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>.

## **Fund-Sponsored Seminars**

The Institute for Continuing Education develops and delivers nationally accredited continuing education symposiums and seminars for healthcare workers, many of which satisfy recertification and licensing requirements or serve as refresher courses. Both discipline-specific and interdisciplinary seminars are offered on-site in New York City. Many are also offered via live videocast at various 1199SEIU-related facilities, and as live webcasts via the Internet. They are offered to qualified Participants with no out-of-pocket expenses.

# **Continuing Education Reimbursement**

Many healthcare workers must earn Continuing Education Units (CEUs) to keep their licenses current, while others seek the latest information in their field. TUF reimburses Participants' fees for Fund-approved CEUs and for technical, professional and therapeutic continuing education conferences, workshops, seminars and programs that are healthcare- or job-related. Details on the reimbursement benefit amounts and deadlines to apply may be viewed at <a href="https://www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>.

Effective September 2024, the maximum benefit amount is \$750 per year. This is subject to Trustee-approved changes.

For more information about Professional Continuing Education, go to <a href="https://www.1199SEIUBenefits.org/">www.1199SEIUBenefits.org/</a> MyTEF, visit a Fund location or contact a Fund staff person by calling (844) TEF-1199.

# **Occupational Certificate Training**

General Eligibility Track B (See, General Eligibility Requirements section on pages 8 – 10)

TUF provides eligible Participants with many options to meet education and training requirements to enter, and advance within, their chosen healthcare profession. The TUF Occupational Certificate Training programs and benefits include:

- Licensed Practical Nursing Program
- Occupational Certificate Program Cohorts
- Occupational Certificate Program Reimbursement

To be eligible to access the TUF Occupational Certificate Training, Participants must meet all eligibility requirements prior to the start of their education or training activity, course or program.

Please see "A Special Note About Certain Shortage Titles Available Through the Career Pathways Training Program" on page 15, which impact eligibility for certain Occupational Certificate Training Programs in "CPT Shortage Titles."

## **Licensed Practical Nursing Program**

TUF provides tuition assistance, counseling, tutoring and other academic support services to Participants who want to become Licensed Practical Nurses (LPNs). Tuition reimbursement is provided to Participants who opt to enroll in an approved LPN program through a Fund-approved vocational school or college. Tuition vouchers may be available for college-accredited LPN programs where TUF has an agreement in place. Information on benefit amounts, requirements and application procedures can be viewed at www.1199SEIUBenefits.org/MyTEF.

We highly recommend that Participants seek guidance on exploring potential schools and programs by making an appointment with a Fund staff person through **MyTEF** or calling (844) TEF-1199.

Participants are required to apply for financial aid through the Free Application for Federal Student Aid (FAFSA) prior to the start of their program. Tuition reimbursement payments are made after the deduction of all awarded financial aid, excluding loans and aid awarded based solely on academic merit.

# **Occupational Certificate Program Cohorts**

TUF offers cohorts for certain occupational certificate programs. The training is designed to support in-demand certification programs. Participant assessment, orientation and interview are required for consideration.

Upon completing the training program, Participants must take the required licensure or certification exams to practice the profession or occupation. Fees for these exams may be included in the

contract with the vendor. In cases where Participants must register for exams on their own, TUF may provide reimbursement, apart from the tuition assistance benefits. TUF may require cohort Participants who do not take these exams within one year of program completion to reimburse the Fund for the cost of the training.

Interested candidates must speak with a Fund staff person prior to enrollment.

### **Occupational Certificate Program Reimbursement**

TUF provides tuition reimbursement for non-degree healthcare industry programs that provide Participants with practical skills to enhance their current work or help them gain certification in the field in which they want to work. Many of these programs prepare Participants to pass a recognized certification examination. Examples of these certifications may include Certified Medical Coder (CMC); Credentialed Alcoholism and Substance Abuse Counselor (CASAC); and Heating, Ventilation and Air Conditioning (HVAC). The Occupational Certificate Reimbursement is a benefit for programs that Participants identify and take on their own. Most programs are reimbursed under the Continuing Education Reimbursement benefit, but a select few high-demand technical certificate programs have higher reimbursement rates.

We highly recommend that Participants seek guidance on exploring potential schools and programs by making an appointment with a Fund staff person through **MyTEF** or by calling (844) TEF-1199.

For more information about Occupational Certificate Programs Training, go to <a href="https://www.1199SEIUBenefits.org/MyTEF">www.1199SEIUBenefits.org/MyTEF</a>, visit a Fund location site or contact a Fund staff person by calling (844) TEF-1199.

## **Paid Release Time and Service Payback Offerings**

TUF offers stipends or paid release time to Participants enrolled in college programs leading to professions identified by Fund Contributing Employers as shortage areas, when available resources permit. Stipends and paid release time are not guaranteed benefits but are offered periodically when TUF's finances or grant receipts allow it. Program availability is at the discretion of the Executive Director.

When funds are available for paid release time and stipends, the program is typically structured as described below. The structure of the program may change based on grant requirements or other education and industry considerations.

The program offers financial and tuition support for full-time enrollment to help Participants finish their academic degree more quickly. In addition, Participants may qualify for stipends or paid release time.

#### For up to two years, TUF will:

- Pay the Participant's salary and benefits for up to one, two or three days per week based on available resources and the structure of the program of study.
- Cover all full-time and required costs of credits needed to complete the program of study, typically at the public college rate.
- Work closely with the Participant, the Union and the healthcare facility's Human Resources department to obtain necessary days off (release time).

#### Participants in the program will be required to:

- Agree to work during weekends, if required, allowing Employers to better plan for release time.
- Meet the minimum course grade requirements set by TUF.
- Upon completion of the program of study:
  - » Take the required licensure exam to practice the profession or occupation.
  - » Actively seek a job with a TUF Contributing Employer.
  - » Provide a service payback with any TUF Contributing Employer for a length determined by TUF management and/or its Trustees prior to enrollment in the program.

Participant must make a good-faith effort to complete the program of study, obtain licensure when appropriate and obtain employment with an Employer that contributes to TUF. If these conditions are not met, the Participant will be asked to repay TUF the cost of the program.

#### **Eligibility:**

#### The Employee must:

- Be actively and continuously employed for one full year by a Contributing Employer that is up to date in making contributions to TUF on their behalf.
- Have an employment status of Wage Class or the equivalent for Employees who
  do not participate in NBF. (Employees may locate their Wage Class information at
   <u>www.1199SEIUBenefits.org/MyTEF</u> or by visiting a Fund location or contacting a Fund staff
   person at [844] TEF-1199.)
- Be accepted and/or enrolled in an accredited degree program from the list of selected occupations and professions.
- Be taking a majority of requisite/major courses (not general education or prerequisite courses).
- Have and maintain a GPA of 3.0 or higher. However, there are times when work-life balance is thrown off and additional support and leniency is called for. If the Participant's GPA falls below

- 3.0, that Participant will work with their case manager to correct the issues during a onesemester grace period. In the event of extraordinary, unfortunate circumstances and more time is needed, the Participant can appeal to the Education Director.
- Enroll full-time in school (12 to 15 credits per school term). Most Participants will engage in a full-time course load of at least 12 credits in their intended major for that specific stipend program. However, there may be semesters for which TUF will make an exception and drop the minimum credits to between 6 and 11 to accommodate programmatic and case management needs.
- TUF may require additional selection criteria and assessments to determine eligibility for
  this benefit that consider academic success feasibility, socio-economic status as part of a
  historically marginalized community and/or past performance in a TUF program and/or other
  healthcare industry needs.



# PROCEDURES, RIGHTS AND DISCLOSURES

## **Selection Procedures**

- A. **Initial Selection:** The Executive Director or her designee will, in the first instance, ascertain if an applicant is eligible to participate in a program in accordance with this document. Where the number of eligible applicants does not exceed the number of Participants authorized for a course or program, the Executive Director may admit all such Participants.
- B. Rules Governing Priority Among Applicants: Where the number of applicants eligible to participate in any course or program exceeds the number of Participants that have been authorized for that course or program, the Executive Director or her designee may create a Selection Committee made up of an equal number of labor and management representatives. The Selection Committee will consider objective criteria to select Participants. The selection criteria might include, but is not limited to:
  - Length of continuous employment
  - Preparedness and qualifications
  - Present or future needs of the Employers for the job the applicant will become qualified to perform

- Speed and economy of training to be provided
- Diversity of Employers

#### **Denial/Loss of Benefits**

As set forth above, where the number of eligible applicants for a program or course exceeds the number of available training positions, Participants shall be selected for training in accordance with the selection procedures set forth above, and the remaining applicants will be denied.

Applicants who do not fulfill the application procedures set forth in this overview or do not meet application deadlines will be denied.

Participants who are otherwise eligible and selected for benefits may thereafter be denied benefits or may lose benefits on any of the following grounds:

- Failure to participate satisfactorily in the course or program or complete a particular course in a reasonable amount of time
- Failure to demonstrate the necessary commitment needed to progress satisfactorily in the course of study
- Failure to attend class on a regular basis
- Failure to achieve the required minimum grade or GPA
- Failure to comply with the educational policies and other standards applicable to students at the school or program in which they are enrolled
- Prolonged absence from a program or abandonment of a program (except in the case of hardship, as determined by the Fund)
- Failure to apply for available financial aid and non-merit based scholarships, including federal
  and state financial aid and scholarship programs periodically offered by the federal or state
  governments. Non-merit based scholarship programs will be specified by the Executive
  Director when appropriate for Participants.
- Failure to present accurate and complete information on all application forms, transcripts or any other program related documents, or falsification of documents
- Program of study is not healthcare- or work-related
- Program of study does not meet any criteria set forth in this document

Applicants will be notified in writing that their respective applications to a program or course have been denied within 90 days of the last day applications to the program or course are allowed, unless, during the foregoing 90-day period they are notified by the Fund of exceptional circumstances that require an

extension of time for notification. In such a case, they will be notified of the exceptional circumstances and the day, not to exceed an additional 90 days, by which a decision will be reached.

The notice of denial will state the reasons for denial, including a reference to pertinent benefit provisions upon which the denial is based. Where applicable, it will include advice as to any additional material or information required to complete the application, indicating the reason it is required.

## **Appeals Procedure**

If Participants are denied benefits, are selected for benefits but lose benefits, are denied continued benefits, disagree with the amount of a loan or tuition assistance benefit, or wish to contest a debt to the Fund, they may appeal the Fund's adverse benefit determination as follows:

First, Fund Participants may appeal to the Executive Director. To appeal the denial of a claim for benefits to which they believe they are entitled, Participants or their authorized representative must file a written appeal and include all information relevant to the claim. TUF counselors may be available to help Participants formulate and gather documents for their appeals. All written requests for appeals must be made within 60 days of the denial of benefits. Appeals to the Executive Director should be sent to TEFExecAppeal@1199Funds.org.

If the Executive Director denies the appeal, in whole or in part, the Fund Participant will be notified in writing of the reason(s) for the denial and the specific plan provision(s) on which the decision was based. If the Participant disagrees with the Executive Director's decision, they have the right to request an additional appeal by writing to the Appeals Committee of the Board of Trustees. The Trustees shall designate an Appeals Committee comprised of equal numbers of Employer Trustees and Union Trustees to hear appeals. Written appeals from Participants to the Appeals Committee should be sent to Legal Operations at <a href="mailto:Appeals@1199Funds.org">Appeals@1199Funds.org</a>.

Decisions of the Appeals Committee will be made in writing, within 60 days after a request for an appeal is received and will include an explanation of the decision and the specific references to any plan provisions on which the decision is based.

If a Participant requests a waiver of a Fund requirement that cannot be met due to economic hardship or because they or an immediate family member has suffered an intervening illness or disability, the Executive Director or the Appeals Committee may, in her/its discretion, take into consideration such circumstances in determining the appeal.

Determinations made through the appeals process outlined above are final, binding and conclusive on all parties, subject to their right under ERISA to proceed in court. All claims against the Fund are subject to the appeals procedure outlined above. No lawsuits may be filed in any court until all steps of these procedures have been completed and the benefits requested have been denied in whole or in part.

#### Remedies

If an appeal is successfully sustained, preference will be given for the next available appropriate program opening, or the Appeals Committee or the Trustees, in its/their sole discretion, may fashion other relief appropriate to the particular facts and circumstances.

#### **Authority of the Trustees**

#### A. Plan Administration and Interpretation

Notwithstanding any other provision in this TBO,<sup>1</sup> and to the full extent permitted by ERISA and the Internal Revenue Code, the Trustees (or any duly authorized designee thereof) shall have the exclusive right, power and authority, in their sole and absolute discretion:

- 1. To administer, apply, construe and interpret the TBO and any related TBO document.
- 2. To decide all matters arising in connection with entitlement to benefits; the nature, type, form, amount and duration of benefits; and the operation or administration of the TBO;
- 3. To make all factual and legal determinations required to administer, apply, construe and interpret the TBO; and,
- 4. Without limiting the generality of the statements above, the Trustees shall have the discretionary authority:
  - a. To determine whether any individual is eligible for any benefits under this TBO;
  - b. To determine the amount of benefits, if any, to which an individual is entitled under this TBO;
  - c. To interpret all the provisions of this TBO (and all related TBO documents);
  - d. To interpret all the terms used in this TBO;
  - e. To formulate, interpret and apply rules, regulations and policies necessary to administer the TBO in accordance with its terms;
  - f. To decide questions, including legal or factual questions, relating to the eligibility for, calculation of and payment of benefits under the TBO;
  - g. To resolve and/or clarify any ambiguities, inconsistencies and omissions arising under the TBO or other TBO documents; and
  - h. Except as specifically provided to the contrary in the provisions of the TBO relating to claims and appeals procedures, to process and approve or deny benefit claims and rule on any benefit exclusions.

<sup>1</sup> The Training Benefit Overview (TBO) is this document.

All determinations made by the Trustees (or any duly authorized designee thereof) with respect to any matter arising under the TBO and any other TBO documents shall be final and binding on all parties.

#### B. TBO Amendment, Modification and Termination

The Trustees reserve the right, within their sole and absolute discretion, to amend, modify or terminate in whole or in part, any or all the provisions of this TBO and may adopt amendments that add to, modify or discontinue any program of benefits or training. No Participant, or any other person, shall have or will have a vested or non-forfeitable right to receive benefits from the Fund. No individual may, in any case, become entitled to additional benefits or other rights under the TBO after the TBO is terminated.

# 1199SEIU TRAINING AND UPGRADING FUND

(646) 473-9200

Outside New York City: (800) 575-7771 www.1199SEIUBenefits.org

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