

Financial Assistance for Employees Studying Procedures

Section 1 - Purpose and Scope

(1) These procedures are intended to give effect to the uniform implementation of the [Financial Assistance for Employees Studying Policy](#) .

Section 2 - Procedures

Study Assistance

(2) Eligible employees are required to provide their Supervisor/Head of Work Unit with a completed 'Study Assistance Application' form with the following supporting documentation attached:

- a. evidence of enrolment in an approved formal study program;
- b. information about the course of study being undertaken, including the number of semesters/trimesters it would normally take to complete the course. This information can usually be found in the institution's handbook; and
- c. where study assistance has been provided for the previous semester/trimester, a copy of that semester/trimester's results.

(3) After the employee has signed the application, and the relevant recommendations/approvals are obtained, the completed form is referred to HR Services. The employee's eligibility will be verified, training records noted and arrangements made to pay the study assistance directly into the employee's bank account.

(4) Employees are required to submit a new application form for each semester/trimester they enrol in the course of study.

Upfront Payment of HECS/Tuition Fees

(5) Employees are required to complete an '[Upfront Payment of Student Contribution Fees](#)' and attach a copy of their enrolment form and the HECS/Tuition Fee invoice. Completed applications and attachments should be referred to HR Services for approval.

(6) After the application has been approved it is referred to Financial Operations for payment. If study is being undertaken at Southern Cross University, Financial Operations staff will liaise directly with Student Administration Services to ensure payment is recorded. If study is undertaken at another institution, payment may be made by electronic funds transfer or by cheque. Details of the enrolling institution's bank account must be provided if electronic funds transfer is the preferred method of payment. Where payment is by cheque, the cheque will be sent to the employee for forwarding to the enrolling institution with their HECS declaration, if applicable.

(7) The Payroll Office will be advised of the debt and equal instalments will be deducted from the employee's fortnightly salary during the semester/trimester period.

(8) Employees are required to submit a new application form for each semester/trimester they enrol in the course of

study.

Full Fee Paying Postgraduate Courses

(9) Eligible employees are required to complete an 'Full Fee Paying Postgraduate Study Assistance Application' at the time of their enrolment. The completed form, evidence of enrolment, an invoice detailing the postgraduate fees associated with their unit of study and a completed 'Expense Payment Fringe Benefit Declaration' form are to be referred to the Head of Work Unit for approval. (Note: employees should confirm the actual amount of the 'Equivalent SCU HECS Cost' with the Finance Officer on ext. 3226 before providing these details on their application.)

(10) Professional employees who are applying for study time, in addition to financial assistance, must provide details of the number of hours requested in the appropriate section of their application. The provisions of the Study Time for Professional Employees Policy apply.

(11) The approved application is to be referred to HR Services for the employee's eligibility to be verified and arrangements made for the assistance to be paid.

(12) If study is being undertaken at Southern Cross University, Financial Operations staff will liaise directly with Student Administration Services to ensure payment is recorded. If study is undertaken at another institution, payment may be made by electronic funds transfer or by cheque. Where payment is by cheque, the cheque will be sent to the employee for forwarding to the enrolling institution with their HECS declaration, if applicable.

(13) Employees are required to submit a new application form for each semester/trimester they enrol in the course of study.

(14) Eligible employees may apply to have the University pay the equivalent SCU HECS costs upfront on their behalf in return for agreeing to repay the amount to the University over the enrolment term.

Fringe Benefits Tax Requirements

(15) An 'Expense Payment Fringe Benefit Declaration' form is to be completed by the employee for Fringe Benefits Tax purposes and should be referred to HR Services with their 'Application for Assistance with Full Fee Paying Postgraduate Study' .

Notification of Withdrawal

(16) Where an employee withdraws from a unit of study, they must provide written advice to HR Services at the time of their withdrawal and the following action is required when a refund of fees is applicable:

- a. where the employee is enrolled at SCU:
 - i. an internal transfer of funds will be arranged and priority given to repaying the University's investment. In situations where the refund is in excess of the University's contribution, the excess will be paid to the employee;
- b. where the employee is enrolled at another institution:
 - i. priority is given to repaying the University's contribution and the employee will be required to remit any refund received. A copy of the remittance advice provided by the enrolling institution should accompany the repayment. Where the refund is in excess of the University's original contribution, the employee may retain any excess refund received.

Status and Details

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Effective Date	13th August 2012
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Expiry Date	1st December 2014
Head of Work Unit	Kath Drew Director, Human Resources
Enquiries Contact	HR Services