

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 - Approval Authority

(2) Executive members have the authority to approve a course of study for study assistance purposes.

(3) The nominated HR Manager has the authority to approve financial assistance for professional employees studying in accordance with University Policies and Procedures.

(4) Heads of Work Units have the authority to approve financial assistance for study in accordance with University Policies and Procedures for:

- a. Academic employees; and
- b. Employees undertaking full-fee paying postgraduate study.

Section 3 - Procedures

Study Assistance

(5) Eligible employees are required to provide their Supervisor/Head of Work Unit with a completed Study Assistance Application 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.

(6) 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.

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

Upfront Payment of Student Contribution Fees

(8) Employees are required to complete an [Upfront Payment of Student Contribution Fees Application](#) and attach a

copy of their enrolment form and their fees invoice. Completed applications and attachments should be referred to HR Services for approval.

(9) After the application has been approved it is referred to Financial and Business Services for payment. If study is being undertaken at Southern Cross University, Financial and Business Services staff will liaise directly with Student 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 student contribution fees declaration, if applicable.

(10) 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.

(11) 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

(12) 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](#) are to be referred to the Head of Work Unit for approval. (Note: employees should confirm the actual amount of the 'Equivalent SCU Student Contribution Fee' with the Finance Officer on ext. 73226 before providing these details on their application.)

(13) 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.

(14) 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.

(15) If study is being undertaken at Southern Cross University, Financial and Business Services staff will liaise directly with Student 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 invoice, if applicable.

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

(17) Eligible employees may apply to have the University pay the equivalent SCU Student Contribution Fee upfront on their behalf in return for agreeing to repay the amount to the University over the enrolment term.

Fringe Benefits Tax Requirements

(18) 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 [Full Fee Paying Postgraduate Study Assistance Application](#).

Notification of Withdrawal

(19) 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

Status	Historic
Effective Date	2nd December 2014
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Approval Date	1st December 2014
Expiry Date	9th August 2017
Head of Work Unit	Kath Drew Director, Human Resources
Enquiries Contact	HR Services