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 of study that leads to a qualification; and
b. for the reimbursement of associated study fees.

(3) In the context of this document, a course of study is all inclusive and may constitute a single subject or course of study, or a program of study that includes a number of subjects or courses.

(4) This procedure should be read in conjunction with:

a. the relevant Enterprise Agreement; and
b. the Equity, Diversity and Inclusion Policy.

Section 2 - Audience

(5) This document should be read and understood by:

a. supervisors;
b. Professional staff, as classified under the University of Newcastle Professional Staff Enterprise Agreement 2023 or its replacing document; and
c. Academic and Teaching Staff as classified under the University of Newcastle Academic Staff and Teachers Enterprise Agreement 2023 or its replacing document; and
d. relevant delegates.

Section 3 - Scope

(6) This procedure applies to staff listed in clause 5 b, and 4c and courses of study that lead to qualifications that are:

a. relevant and appropriate to the staff member’s current or likely future duties and responsibilities at the University;
b. achieve the University's objectives; and
c. are agreed to between the University and the staff member.

(7) 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

(8) Eligibility for study leave, examination leave and reimbursement of associated fees will be in accordance with the relevant Enterprise Agreement and this procedure.

(9) Staff should seek to undertake study at the University of Newcastle where a relevant program is offered. In circumstances where a relevant course of study 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

(10) Before commencing the proposed course of study the staff member must complete an Application to Undertake a Program of Study With or Without Reimbursement.

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

(12) In determining a staff member's application to undertake a course of study, with or without reimbursement, the appropriate 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 courses of study the staff member has previously undertaken that have been supported by the University and the estimated total cost of the proposed course 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 course of study will provide the particular staff member as discussed during the Performance Review and Development (PRD) process.

(13) An approval granted by the appropriate delegate will apply for the duration of the course of study, unless:

a. the staff member is subject to proceedings under the Enterprise Agreement for underperformance, misconduct or serious misconduct;

b. the staff member is not progressing as planned through the course of study;
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, or equivalent, and where this is not in conflict with the staff member's employment contract or Enterprise Agreement.

(14) Once approval is granted, 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.

(15) Human Resource Services will save a copy of the approval on the staff member's file, in accordance with the Records Governance Policy.

(16) Staff members who have approval to undertake a course of study will have access to study leave, examination leave, pre-examination leave and travel time as outlined in the relevant and current Enterprise Agreement.

Rate of Fee Reimbursement and Conditions

(17) 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.

(18) Staff must be employed by the University of Newcastle to claim reimbursement of study fees.

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

(20) To avoid unnecessary cost to the University, staff are expected to apply for credit or Recognition of Prior Learning (RPL) where possible.

(21) In exceptional circumstances, a delegate may approve a higher proportion of reimbursement of fees if the study provides significant and immediate benefit to the organisation.

(22) 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

(23) Once the staff member successfully completes a course/subject, they should complete an Application for Reimbursement of Study Fees. Where possible this should be made in the same calendar year in which the course is undertaken.

(24) 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.

(25) The completed Application for Reimbursement of Study Fees form must be provided to the appropriate delegate for approval. The Application for Reimbursement of Study Fees form is to be returned to the staff member after the appropriate delegate has considered the application and made a determination.

(26) Once the Application for Reimbursement of Study Fees form is approved, the staff member must claim reimbursement of the fees 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.

Recovery of Reimbursed Fees

(27) For any Application to Undertake a Program of Study with fee reimbursement approved on or after the effective date of this Procedure, the University reserves the right to recover a proportionate amount of fees reimbursed. Accordingly, fee recovery may be sought from staff members who resign or abandon their employment with the University.

(28) The recovery rate will be calculated in accordance with the below formula and applied to the amount of reimbursement received by the staff member during the 12 month period prior the staff member's date of exit from the University.

(29) Recovery of reimbursed fees applies to all reimbursements received within the above stated 12 month period. Repayment will be calculated separately for each relevant reimbursement amount based on the time elapsed since the respective reimbursement date. The total repayment amount will be the sum of the individual calculations.

(30) The repayment amount for each applicable reimbursement will be determined using the following formula:

> Repayment Amount = Reimbursement Amount x {(12 – Months Worked After Reimbursement)/12}

Example Scenario – One Reimbursement

Reimbursed Amount	$2500.00
Staff Member Leaves After	6 months
Calculation	$2500.00 x [(12-6)/12] = $2500 x 0.5
Repayment Required	$1250.00

Example Scenario – Multiple Reimbursement

Reimbursed Amount 1	$2500.00	Reimbursed Amount 2	$2500.00
Staff Member Leaves After	6 months	Staff Member Leaves After	3 months
Calculation	$2500.00 x [(12-6)/12] = $2500 x 0.5	Calculation	$2500.00 x [(12-3)/12] = $2500 x 0.75
Repayment Required	$1250.00	Repayment Required	$1875.00
Total Repayment Required	$1250 + $1875 = $3125		

(31) The recoverable amount may be deducted from the staff member's final salary payment upon cessation of employment.

Fringe Benefits Tax (FBT) Implication

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

(33) 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.

(34) 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 Financial Services via ServiceNow if you require further information.

Review

(35) 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	8th April 2025
Review Date	26th March 2028
Approval Authority	University Secretary
Approval Date	8th April 2025
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.

"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.

"Recognition of Prior Learning (RPL)" - Means an assessment of an individual's prior learning to determine where credit will be granted. RPL includes formal, informal, and non-formal learning.

"Program" - When referring to learning, a program is a sequence of approved learning, usually leading to an Award. 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.

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

"Delegate" - (noun) refers to a person occupying a position that has been granted or sub-delegated a delegation of authority, or a committee or body that has been granted or sub-delegated a delegation of authority.