

STAFF STUDY SUPPORT PROCEDURE

PURPOSE

The University may provide payment of study fees, study leave and/or reimbursement of other study-related expenses and benefits (staff study support) to eligible employees who undertake an approved study course of relevance and benefit to their role and future career at the University ('us', 'our' or 'we'). Staff study support may also be offered as an incentive to attract quality employees at the time of appointment, however payment of fees cannot commence until after the employee has completed a full year of service.

The purpose of this procedure is to clarify the application of staff study support as it applies to eligible employees and to provide the pathways to apply for and to administer the procedure.

SCOPE

This procedure applies to full-time and part-time, continuing and fixed-term employees at all Australian campuses who have completed a minimum of one year's service, herein collectively referred to as 'you' for the purpose of this procedure.

With approval from the Dean/Executive Director or equivalent, eligibility for reimbursement of fees includes employees on parental leave or long service leave where the commencement of the study course was prior to the start of the leave commencing.

Sessional employees, casual employees and employees on special unpaid leave are not eligible for staff study support.

PROCEDURE STATEMENT

1. Conditions of staff study support

- 1.1 If you are an eligible employee who is accepted into an approved study course, you may apply for the following forms of staff study support:
 - for an approved study course at the University, upfront payment by us up to \$6,000 per annum (including the student amenities fee);
 - for an approved study course at an external institution, reimbursement of course fees up to \$6,000 per annum;
 - study leave; and/or
 - reimbursement of other study-related expenses and benefits.
- 1.2 If you are an eligible employee who is undertaking study that is not an approved study course, you may apply for study leave providing the course:
 - relates to your current role and future development; and
 - is reflected in your performance plan.
- 1.3 You will be required to apply for staff study support each year preferably at the beginning of the year during the performance planning discussion. The agreement on staff study support can be for the duration of the year, or made on a semester-by-semester basis.
- 1.4 All staff study support must be agreed with your performance supervisor and the Head of Unit and approved by the Dean, Executive Director or delegate as outlined below.
- 1.5 In the event that you are undertaking an approved study course at the University and you do not pass a subject(s), you will be required to pay the cost of repeating the subject(s). If you are undertaking an approved study course at an external institution and you do not pass a subject(s), you will not be entitled to claim reimbursement for the cost of that subject(s). If you do not re-enrol in the subject, you will be required to reimburse us for the amount paid by us towards the cost of the course.

- 1.6 In agreeing to staff study support, you will commit to remaining in the employ of the University for at least one year after the completion of any subjects which form part of the approved study course. Where you depart the University without discharging the required commitment, you will be required to repay the amount of fees paid by us for the current and previous year. If your employment ceases due to the expiry of your contract or we terminate your employment (other than on the grounds of unsatisfactory performance and/or misconduct), the condition of discharging your commitment to us will not apply.

2. Application process

Step 1: You and your performance supervisor discuss the staff study support

2.1 You will:

- discuss the proposed course of study, anticipated time commitment and the support you are seeking with your performance supervisor; and
- confirm eligibility to receive staff study support with your performance supervisor.

2.2 Your performance supervisor may:

- seek advice from the HR Business Partner on the staff study support; and
- check with Access HR on 9902 0400 to ensure that an entitlement to apply exists.

2.3 If your performance supervisor agrees that the course is of relevance and benefit to you and the work unit or us, you should update your performance and development plan to reflect the intended course of study.

Step 2: You apply for the approved study course

2.4 If you have not previously been accepted into the study course, you will then apply for the study course as agreed with your performance supervisor via the normal application process.

2.5 Note that applications are subject to the regular entry requirements and a full fee place being available. Your performance supervisor should ensure that you understand that at this stage no firm commitment to the study has been made by us.

Step 3: You apply for staff study support

2.6 You will advise your performance supervisor if accepted into the course and provide your performance supervisor with a draft [Staff Study Support Application Form](#). The Staff Study Support Application Form will include details of the amount of payment/reimbursement you are applying for, an estimate of the amount of study leave and any other study-related expenses and benefits sought.

2.7 Your performance supervisor will review the form and, in consultation with you, will finalise the application.

Step 4: You seek approval for the staff study support

2.8 You will submit the [Staff Study Support Application Form](#) to the Head of Unit who will consider the application. If agreed, the Head of Unit will sign the Staff Study Support Application Form acknowledging their support for the application.

2.9 The Head of Unit will then submit the completed Staff Study Support Application Form to the Dean, Executive Director or delegate for approval.

2.10 The Dean, Executive Director or delegate will make a decision to support, to amend or to reject the application and will notify the Head of Unit. In amending an application, the Dean or Executive Director may agree to only some parts of the application or may suggest an alternative arrangement.

- If approved, the Staff Study Support Application Form will be signed by the Dean, Executive Director or delegate and forwarded for processing to Monash HR.
- If amended, the Staff Study Support Application Form will be returned to the Head of Unit for discussion with you your performance supervisor.
- If rejected, the Dean, Executive Director or delegate will provide the necessary information giving grounds for the rejection to the Head of Unit for communication to you and your performance supervisor.

Step 5: Monash HR records the approved study course and arranges for the fees to be paid for courses at the University

2.11 For approved study courses at the University, Monash HR will record the relevant cost center and fund details on the approved [Staff Study Support Application Form](#). Monash HR will then email a copy of the form to the Fees Unit so that the Fees Unit can assign the approved fees (to a maximum of \$6,000 per annum) to the faculty or division.

2.12 Monash HR will also ensure that the approved study course will be recorded in SAP and the form will be placed on your personnel file.

Step 6: You enrol in the approved study course

- 2.13 You will then enrol in the approved study course.
- If the approved study course is at the University, you will enrol via WES and the amount approved for payment by us will be automatically assigned by the Fees Unit to the relevant faculty or division cost center and fund (and sent to the Head of Unit for approval). The remainder of the fees will be invoiced to you for payment.
 - If the approved study course is external to the University, you will pay the course fees (subject to the normal rules relating to the payment of fees) and seek reimbursement upon successful completion of the subject(s).

Step 7: You apply for study leave through ESS

- 2.14 You and your supervisor will agree upfront to the estimated amount of study leave you will take during the relevant period (see Step 3 above). This will be authorised by the Head of Unit and Dean, Executive Director or delegate through the application process. However, you will then need to apply for the leave directly through ESS.
- 2.15 In approving the study leave, your supervisor must ensure that the study leave is approved in accordance with the agreed parameters in the [Staff Study Support Application Form](#).

Step 8: You seek reimbursement for an external approved study course or other study-related expenses and benefits

- 2.16 If you have engaged in an approved study course at an external institution and/or have approved other study-related expenses and benefits that you will be seeking reimbursement for, you will make a claim for reimbursement of the expenses through Concur at the completion of the subject(s) (refer to the [Reimbursement Procedures](#)). You must attach proof of successful completion of the subject(s) and relevant invoices to the claim(s).

Step 9: Your performance supervisor reviews and monitors your progress during the year

- 2.17 Your performance supervisor will monitor and review your progress and achievements in undertaking your studies during the course of the studies (as necessary) and at each performance review meeting.

3. Breach of procedure

- 3.1 We treat any breach of our policies or procedures seriously. We encourage reporting of concerns about non-compliance and manage compliance in accordance with the applicable Enterprise Agreement or contract terms.

DEFINITIONS

Approved study course	Includes all full-fee paying graduate or postgraduate studies offered by the University and which meet the FBT exemption criteria for self-education. Other types of study that may be accepted include studies at institutions other than the University where the course is not offered by the University or where the employee has been unable to obtain a place in the same or similar course at the University. Studies at other institutions must meet criteria for relevance and benefit to the employee's role and future related career at the University. Courses at other education institutions that may be considered include those at graduate and postgraduate level (but not normally doctoral courses), TAFE courses and accredited programs (such as those offered by professional institutions or private providers). Undergraduate courses are not considered approved study courses.
Concur	The University's online expense management system. It is used for reimbursements and corporate credit card reconciliations.
Continuing employees	Employees of the University engaged in full-time or fractional employment other than fixed-term, sessional or casual employment.
Employee Self Service (ESS)	The online Employee Self Service system which provides staff members with easy and private access to personal and current employment information held by the University.
Fixed-term employees	Employees of the University engaged in fixed-term employment as defined under clause 16.4 of the Monash University Enterprise Agreement (Academic and Professional Staff) 2014, clause 18.1 of the Monash University Enterprise Agreement (Trades and Services Staff - Building and Metal Trades Staff) 2009, and clause 18.1 of the Monash University Enterprise Agreement (Trades and Services Staff - Catering and Retail, Cleaning and Caretaking, and Miscellaneous Services Staff) 2005.

Fringe benefits tax (FBT) exemption	FBT is a tax levied by the federal government on an employer that is designed to tax many of those benefits that an employee receives outside their normal taxable income. To avoid FBT requirements the course that an individual seeks to study must be a full fee paying course and not HELP (HECS) funded and be related to the individual's employment and related career.
HELP (and HECS)	A loan available to eligible students enrolled in Commonwealth supported places. A HECS-HELP loan covers all or part of the student contribution amount and is subject to Fringe Benefits Tax. The University will not provide reimbursement of HECS and HELP payments and debt.
HR Business Partner	A key member of the Monash HR Business Partnering community and provides strategic advice, guidance and solutions that underpin key client goals, HR strategy and organisational vision to a particular client group.
Other study related expenses and benefits	Include text books and other study materials that may be reimbursed at the discretion of the Head of Unit. Employees are required to pay for these expenses and seek reimbursement at the end of the semester upon presentation of successful completion of subject(s) and a tax compliant receipt, evidencing payment of the expenses. Employees will not be reimbursed for computers, notebooks, stationery and any travel expenses associated with undertaking the course of study.
Study leave	<p>Leave that is provided by the University to employees for the purpose of attending approved courses of study and related examinations.</p> <p>The period of study leave available for professional staff members employed for at least 0.5 full-time equivalent is up to 4 hours per week, and this may be taken in an accumulated form of larger blocks of time provided that this is agreed with the performance supervisor and approved by the Head of the Unit and Dean, Executive Director or delegate in accordance with the requirements of this procedure. Study leave may only be used for study purposes.</p>
WES (Web Enrolment System)	The University's online student enrolment system.

ADMINISTRATION

Parent policy	Probation, performance and promotion
Supporting policies	<ul style="list-style-type: none"> • Employment conditions • Equal opportunity • Ethics Statement • Integrity and respect • Leave and wellbeing • Pay, benefits and entitlements • Recruitment and appointment
Supporting procedures	<ul style="list-style-type: none"> • Performance development process: academic staff • Performance development process: professional staff • Salary Packaging
Supporting documents	<ul style="list-style-type: none"> • Concur Expense Management • Fringe benefits tax: a guide for employers • Staff Study Support Application Form <p>Monash University Enterprise Agreement (Academic and Professional Staff) 2014</p> <ul style="list-style-type: none"> • Clause 40 - Other Leave • Clause 64 - Performance Development <p>Monash University Enterprise Bargaining Agreement (Trades and Services Staff - Building and Metal Trades Staff) 2009</p> <ul style="list-style-type: none"> • Clause 25 - Performance Enhancement • Clause 57 - Training <p>Monash University Enterprise Agreement (Trades and Services staff - Catering and Retail, Cleaning and Caretaking, and Miscellaneous Services Staff) 2005</p> <ul style="list-style-type: none"> • Clause 26 - Performance Enhancement • Clause 48 - Training



Legislation mandating compliance

Responsibility for implementation

Approval body Chief Human Resources Officer

Procedure owner Director Workplace Relations

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