

JOANN

**Tuition Reimbursement
Handbook**

INTRODUCTION

Tuition reimbursement rewards you for your contributions, adds to a great work environment and promotes the shared responsibility between JOANN Stores and you for individual and company success. This benefit helps to cover a portion of the cost of tuition and certain other eligible expenses as you earn your undergraduate or graduate degree.

ELIGIBILITY

Plan Eligibility

To be eligible for benefits in the tuition reimbursement program, you must at the time of application, enrollment and completion:

1. Be an active, full-time Team Member in good standing.
2. Have at least one continuous year of full-time service.

Good standing means an eligible Team Member who does not have a documented Performance Discussion Record at the time of application.

TUITION REIMBURSEMENT BENEFIT

Team Members will be reimbursed 50% of tuition and other eligible expenses up to \$5,250 per calendar year for the successful completion of approved courses. You must be actively employed as an eligible full-time Team Member at the time the course is completed to receive your reimbursement. Classes must not interfere with your normal work schedule.

Course Approval for Non-Taxable Reimbursement

The guidelines below will be used to assist the decision process in course approval.

1. A degree related course that helps you obtain your goal of an undergraduate or graduate degree that will align with our business needs.
2. Only courses completed at an accredited educational institution will qualify for tuition reimbursement.

Course Approval for Taxable Reimbursement

At the discretion of JOANN, consideration may be given to approval of courses that do not meet the guidelines for non-taxable reimbursement to be reimbursed on a taxable basis.

When You Receive Reimbursement

The calendar year maximum benefit is reduced by the amount of the tuition reimbursement benefits paid to the Team Member in that calendar year regardless of the date the course was approved, commenced or concluded. For example, a course approved in December 2020 for a class that concludes in March 2021 will be applied against the 2021 calendar year maximum.

Benefit Taxation

Courses approved for non-taxable reimbursement are not subject to federal or state income tax.

Other Educational Monetary Assistance

The tuition reimbursement program is designed to provide financial support to help you reach your educational goals consistent with your development at JOANN. You are encouraged to seek additional sources of financial aid to supplement the JOANN program.

Team Members who receive grants, scholarships and/or Veteran's Administration benefits should fully utilize these sources of assistance prior to using the JOANN Tuition Reimbursement Program. Amounts granted for these types of assistance will be deducted from your reimbursement. All financial aid must be disclosed on the tuition reimbursement application.

EXPENSES ELIGIBLE FOR REIMBURSEMENT

Eligible Expenses for Non-Taxable Reimbursement

To be eligible for reimbursement, you must complete a Tuition Reimbursement Program Pre-Approval Application prior to the class beginning, as well as a Tuition Reimbursement Program Reimbursement Request form after successful class completion. The cost of tuition, course registration fees, textbooks, and lab fees charged to students for the approved course are eligible expenses. Graduate-level courses must be completed with a grade of B or better. Undergraduate-level courses must be completed with a grade of C or better.

Ineligible Expenses for Non-Taxable Reimbursement

These would include, but are not limited to: parking, late registration fees, administration fees, computers, building fees, supplies, student activity fees, transportation, professional meetings, workshops, conventions, licensures, certifications, coursework toward a law degree, continuing education, insurance, and test preparation. Also, courses for which you are receiving financial assistance from another source that would duplicate reimbursement or for which a letter grade was received that is lower than the requirement are not eligible.

ELIGIBLE EDUCATIONAL PROVIDERS

Graduate and undergraduate courses must be provided by an accredited educational provider that results in college credit.

Accreditation is a status granted to educational institutions found to either meet or exceed academic quality standards established by an accrediting agency through an assessment process. Accreditation assures the Team Members and JOANN that the course and/or educational institution meets academic quality standards, including academic core value of performance, integrity and quality assurance.

Contact your educational establishment if you are not certain if it is an “accredited” school. Alternatively, the US Department of Education maintains a database of accredited institutions, which you may search: [DAPIP | Homepage](#)

REIMBURSEMENT TO JOANN

Team Members who voluntarily leave the employment of JOANN, or who are terminated for cause within two years of receiving tuition reimbursement payments must reimburse JOANN for any payments received under this program within the two years before their departure. By submitting a reimbursement request and accepting reimbursement payment, the Team Member authorizes JOANN to deduct such amounts in the maximum amount that may be withheld under all applicable laws (or the balance due), from the Team Member’s remaining and final paychecks, PTO account, or any other sums other than non-qualified deferred compensation owed by JOANN to the Team Member. Any additional remaining balance shall be repaid to the company by the Team Member within thirty (30) days of termination. (Example: You are reimbursed \$2,000 on February 14, 2020 for a class you completed in December 2019. You leave JOANN in January 2022. You are responsible to reimburse JOANN for the \$2,000.)

APPLYING FOR COURSE PRE-APPROVAL

- Pre-Approval Applications are located on JASNet under the Forms section. Complete the Pre-Approval Application and return it to the Benefits Department at joannstoresbendept@joann.com .
 - Both you and your manager must sign the form *prior* to submitting the request. The application should be received by the Benefits Department at least two weeks prior to the scheduled start date.
- Incomplete applications will not be processed and will be denied, in which case a new complete application will need to be submitted.

Application Approval

- Once your application has been successfully completed and submitted to the JOANN Benefits Department, it will be reviewed for eligibility.
- Notification of the approval or denial of the application will be sent to you via email.

- Upon application approval, you pay the tuition and applicable course fees directly to the educational provider.
- Upon successful course completion, submit a Reimbursement Request form with grades, itemized receipts and proof of payment within 60 days of the term end date.

Falsified Documents or Application

It is your responsibility to submit copies of original, unaltered documents and fully disclose all required information (e.g. receipt of scholarship money) as required during the application and/or reimbursement processes. Falsification and/or purposeful omission of required information may result in disciplinary action up to and including termination of employment. JOANN reserves the right to contact your educational provider about, and to receive, required documentation to support any reimbursement request.

FILING A REQUEST FOR REIMBURSEMENT

How To Submit Your Reimbursement Request:

- Reimbursement Request forms are located on JASNet under the Forms section.
- Upon course completion and receipt of your final grade, complete the Reimbursement Request form.
- For undergraduate and graduate courses, attach copies of:
 - Your letter grade in the form of a report card or official transcript. This documentation must clearly show the date when the course occurred. A grade of "C" or better for undergraduate courses or a "B" for graduate courses is required for reimbursement.
 - Proof of paid tuition—a copy of your tuition bill marked "paid in full". Expenses covered by scholarships or grants are not eligible for reimbursement. *Note: For those institutions offering a deferred payment program, the invoice indicating the amount due will be required, along with a letter stating your deferral was approved by the school.*
- Forward the completed form and attachments to the Benefits Department at joannstoresbendept@joann.com
- All requests for reimbursement must be received no later than 60 days after the course completion in order to be considered for reimbursement.

Upon Approval

You will receive payment once your Reimbursement Request form, grades and receipt have been received and processed. All reimbursements will be made payable to the Team Member. Reimbursements cannot be made payable directly to the provider.

- You must be an active Team Member at the time of payment of your reimbursement benefit to be eligible for reimbursement.

- You will be reimbursed for non-taxable reimbursements on a separate check from Accounts Payable normally within two weeks following approval.
- You will be reimbursed for taxable reimbursements through payroll. The amount will appear on your check as soon as administratively possible following approval, normally two to four weeks.
- You are expected to reimburse JOANN the full amount of any reimbursement overpayment, regardless of the reason for the overpayment.
- While completion of a course is a noteworthy achievement, it is not a guarantee of promotion, transfer, reassignment or pay increase.

Separation and Rehire

If your employment ends before the successful completion of a course and payment of the reimbursement benefit, you are not eligible for reimbursement for that course.

Form Submission Options

Submit all forms to the JOANN Benefits Department using one of the methods below.

Mail: JOANN Stores
ATTN: Benefits Department
5555 Darrow Road
Hudson, OH 44236

Email: joannstoresbendept@joann.com

APPROVED LEAVE OF ABSENCE

If you take an approved leave of absence, you will remain eligible to participate in the tuition reimbursement plan provided you meet the eligibility and service requirements.

TERMINATION OF EMPLOYMENT

This program shall not be construed to give any team member the right to continue as a team member of JOANN for any period of time. If your employment with JOANN ends for any reason before you have received reimbursement, your reimbursement request will not be processed. To receive reimbursement, you must remain employed with JOANN through the date your reimbursement is processed by the Accounts Payable Department. Also, if you voluntarily terminate employment with JOANN or are terminated for cause within two years after receiving a reimbursement or reimbursements under this program, you must repay any such amounts to JOANN as described above in this program.

ADMINISTRATION

This program will be interpreted and administered by the JOANN Benefits Department in its discretion. The JOANN Benefits Department may establish rules and procedures from time to time as it deems advisable for the administration of this program. This program does not create a contract for reimbursement to Team Members for tuition or other educational expenses.

REQUEST FOR REVIEW OF DENIAL

If you believe your application for course approval or request for reimbursement was denied inappropriately, you may request a review for reconsideration. The request must:

- Be submitted to the JOANN Benefits Department within two weeks of receiving the denial
- State your position, include supporting documentation and identify the section of this handbook that you believe was inaccurately interpreted.

Your request for review will be reviewed within two weeks by the Chief Administrative Officer.

AMENDMENT OR TERMINATION

JOANN reserves the right to amend or modify this program, limit the availability of this program, or terminate this program, at any time or times, without advance notice to team members.

FOR MORE INFORMATION

Questions about the tuition reimbursement program should be directed to the JOANN Benefits Department at (330) 463-8778 or joannstoresbendept@gmail.com.

Tuition Reimbursement Program Pre-Approval Application

Must be submitted 2 weeks prior to the scheduled start date of classes

TEAM MEMBER INFORMATION:

Name:	Team Member ID#:
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CLASS INFORMATION:

Name of Educational Provider (i.e. college, etc.)	Quarter / Semester & Year	Course Title	Undergraduate (U) Graduate (G)?		Tuition Cost, Books, Registration and Lab Fees

CERTIFICATION:

I certify the information I have provided above is accurate to the best of my knowledge. I grant permission for JOANN to contact the educational provider listed on this form regarding documentation to support the reimbursement and I grant permission for the educational provider to provide the requested documentation directly to JOANN. I understand that I must be an active, full-time Team Member in good standing, at the time of course enrollment, completion and through the date of reimbursement in order to receive reimbursement. I understand I will be reimbursed 50% of expenses directly related to tuition, books, and any registration and/or laboratory fees, only if I complete an undergraduate course(s) with a grade of C or better and a graduate course(s) with a B or better. I also recognize that the maximum reimbursement amount per calendar year is \$5,250. I understand that I WILL NOT be reimbursed for technology fees, building fees, athletic fees, student activities, parking fees, supplies, travel and courses for which I am receiving financial assistance from another source, such as a grant or scholarship. Further, I understand that if I voluntarily leave the employment of JOANN or am terminated for cause within 2 years of receiving a tuition reimbursement payment, I must reimburse JOANN for any payments received under this program during the 2 years before my departure. JOANN may deduct such amounts from my last paycheck, vacation account, or any other sums owed to JOANN by me as specified in the Tuition Reimbursement Program Handbook provided to me. **I certify that I have received and read the Tuition Reimbursement Program Handbook.**

Team Member's Printed Name:

Date:

Team Member's Signature:

Date:

TO BE COMPLETED BY MANAGER / SUPERVISOR:

I certify that the above named Team Member has not had a documented Performance Discussion Record within the past 6 months.

Manager / Supervisor's Printed Name:

Date:

Manager / Supervisor's Signature:

Date:

**TO BE COMPLETED BY
BENEFITS DEPARTMENT:**

Date Application Received:	Full-Time? Yes No	Full-Time Effective Date:	Accredited College or University?
Application Approval:	Reason for Denial:	Non-Taxable Taxable	

Benefits Department Printed Name:

Date:

Benefits Department Signature:

Date:

ADDITIONAL FINANCIAL ASSISTANCE (IF APPLICABLE)

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Tuition Reimbursement Program Reimbursement Request

Must be submitted no later than 2 months following course completion in order to receive reimbursement. Copies of your official transcript and proof of paid tuition must be attached

TEAM MEMBER INFORMATION:

Name:	Team Member ID#:
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CLASS INFORMATION:

Name of Educational Provider (i.e. college, etc.)	Quarter / Semester & Year	Course Title	Undergraduate / Graduate?	Letter Grade Received	Tuition Cost (Please note any other financial assistance that you are receiving on the back of this form)
Total Cost:					

CERTIFICATION:

I certify the information I have provided above is accurate to the best of my knowledge. I grant permission for JOANN to contact the educational provider listed on this form regarding documentation to support the reimbursement and I grant permission for the educational provider to provide the requested documentation directly to JOANN. I understand that I must be an active, full-time Team Member in good standing, at the time of course enrollment, completion and through the date of reimbursement in order to receive reimbursement. I understand I will be reimbursed 50% of expenses directly related to tuition, books, and any registration and/or laboratory fees, only if I complete an undergraduate course(s) with a grade of C or better and a graduate course(s) with a B or better. I also recognize that the maximum reimbursement amount per calendar year is \$5,250. I understand that I WILL NOT be reimbursed for technology fees, building fees, athletic fees, student activities, parking fees, supplies, travel and courses for which I am receiving financial assistance from another source, such as a grant or scholarship. Further, I understand that if I voluntarily leave the employment of JOANN or am terminated for cause within 2 years of receiving a tuition reimbursement payment, I must reimburse JOANN for any payments received under this program during the 2 years before my departure. JOANN may deduct such amounts from my last paycheck, vacation account, or any other sums owed to JOANN by me as specified in the Tuition Reimbursement Program Handbook provided to me. **I certify that I have received and read the Tuition Reimbursement Program Handbook.**

Team Member's Printed Name:

Date:

Team Member's Signature:

Date:

TO BE COMPLETED BY MANAGER / SUPERVISOR:

I certify that the above named Team Member has not had a documented Performance Discussion Record within the past 6 months.

Manager / Supervisor's Printed Name:

Date:

Manager / Supervisor's Signature:

Date:
