

Instructions for Completing the Dependent Tuition Assistance Request Form

Read this form and the information on the UPMC Infonet at <http://benefits.infonet.upmc.com/TuitionEntry.htm>. Neatly complete ALL requested information. **Sign** and **date** the form and **submit** at the end of the term with required documents to the address or fax above. Please do not submit your information multiple times, send items separately, or include information from more than one term as this only serves to delay the processing of your information. Timely processing depends on your clear, accurate, and complete submission.

Eligible Dependents: Eligible dependents include your:

- legally married spouse or domestic partner (marriage certificate or UPMC Domestic Partner Affidavit must be on file with the UPMC Employee Service Center)
- dependent child who meets each of the following criteria:
 - ✓ is your biological child, stepchild, approved domestic partner’s child, legally adopted child, child placed with you for adoption, or child for whom you are an approved legal guardian by court order (UPMC Domestic Partner Affidavit or guardianship court order must be on file with Employee Service Center)
 - ✓ resides with you or with their other parent (except while away at school)
 - ✓ is under age 25
 - ✓ is unmarried

UPMC reserves the right to perform periodic audits on benefit eligibility, requesting the appropriate documentation to verify dependent status. See the below “Proof of Qualifying Dependent Status” section in the reimbursement checklist for documents you may need to include with this claim.

Submitting for Reimbursement: *The following documents must be submitted within 6 months after the course completion date for reimbursement.* Reimbursements can take up to 4 weeks to process and will be issued in the next paycheck after processing. Note: Dependent children must maintain 12 credits throughout the term (unless approved by UPMC for a qualified medical exception).

Use this checklist to guide you in submitting all the required items for reimbursement:

Information from the school must be *pre-printed by the school* and include the student’s name, semester, and school.

- Completed and signed Dependent Tuition Assistance Request Form
 - Print a new form from the Infonet each term to make sure you are using the most current version.
 - A separate request form is required for each term.
- Invoice/itemized bill
 - Must specify exact amount of tuition, fees, and other charges as well as show the term, student, and school.
- Official proof of payment showing method of payment
 - You must account for how the total bill for this term was paid. A receipt from the school is only acceptable if it clearly itemizes payments. If it does not, you will have to supply a copy of your cancelled check, credit card statement, verification of grant/scholarship award, or other documentation that details each payment’s source.
- Proof of successful completion - grade report
 - Must obtain an “A”, “B”, “C”, “P”, or “S” grade for each course.
 - Children attending summer semester courses must also provide a grade report from the spring semester of that year as proof they completed the spring term as a full-time college student.
- Proof of qualifying dependent status (only if not previously supplied)
 - Must meet the definition of an eligible dependent as shown above in “Eligible Dependents”. A marriage certificate, UPMC Domestic Partner Affidavit, or guardianship court order must be on file with UPMC Employee Service Center.

A Note About Taxes: UPMC complies with governmental tax policies for tuition assistance. Assistance received by staff members for dependents is taxable. Federal, state, and local taxes will be taken from your reimbursement at the time of payment.

Repayment of Tuition Assistance: Staff members must repay any tuition benefits received if termination or change to an ineligible status occurs within 12 months from the course completion date. Repayment is taken from your final check (including accrued, unused paid time off payments) and any remaining balance is to be paid directly to UPMC within 30 days of termination.

DEPENDENT TUITION ASSISTANCE REQUEST FORM

See page 1 for completion instructions and documentation requirements for this request. Type or print legibly and complete all information in black or blue ink. Do not use abbreviations or acronyms. Incomplete forms will be returned. **Must submit within 6 months after end of term.**

Staff Member Information

Name: _____ Daytime Phone: _____

Last 4 Digits of Social Security #: XXX-XX- [][][][] Job Status: Full-time/Flex Full-time Job Share/Reg Part-time

UPMC Employee ID # (required)*: [][][][][][][][] Pay Frequency: Bi-weekly Monthly

** If you do not have your UPMC Employee ID Number, you may obtain it in My HUB (select the Human Resources tab and then select View Job Information under My Profile), in Kronos, or from your supervisor. It is not found on your employee badge or health insurance ID card.*

Student Information

Relationship (as defined by the dependent definition on page 1):
 Spouse
 Domestic Partner Adult
 Dependent Child
 Dependent Domestic Partner Child

Student Name: _____
 Student Social Security #: _____
 Student Birth Date: _____
 Does this student hold a bachelor's degree from any institution? Yes No

Institution Information

University of Pittsburgh Branch: _____

Community College School: _____

UPMC Proprietary School (UPMC owned school) School: _____

Vocational/Technical School (approved healthcare majors only) School: _____

Program/Course Information

Do not use abbreviations or acronyms.

Complete all items below

Enrollment Status: Full-time student Part-time student

Credits: _____ (12 credits minimum for dependent child**)

Class Start Date: _____/_____/_____

Class End Date: _____/_____/_____

Major: _____

Semester: Fall Spring Summer

Degree Program: Associate's Bachelor's Other

Graduation Date: _____/_____/_____ ***

** Unless your dependent is approved by UPMC for a qualified medical exception.

*** Note: For health and other UPMC benefits, dependent children must be full-time students (minimum 12 credits undergraduate/ 9 credits graduate) to remain on coverage. Student status verification for benefits is separate from the UPMC Tuition Assistance program. It is your responsibility to notify the UPMC Employee Service Center at 1-800-994-2752, option 3, when full-time student status ends due to graduation or other factors and your dependent is no longer eligible for health and other UPMC benefits. Failure to do so will forfeit rights to COBRA.

Documentation Checklist

You must submit this form and all of the following items within 6 months after the class end date. See page 1 for details.

Must supply all items listed below for each claim

Invoice/itemized bill
 Proof of payment
 Proof of successful completion (grade report)
 Proof of qualifying dependent status (only needed if not already supplied - refer to Proof of Qualifying Dependent Status portion of the reimbursement checklist on the attached page 1)

- I agree to repay tuition assistance received for coursework completed in the 12 months prior to termination or a change to an ineligible job status. If subject to repayment, I authorize UPMC to deduct the amount owed from my wages by means of payroll deduction without further authorization from me. If I become responsible to repay this tuition assistance by virtue of the end of my employment, I authorize UPMC to withhold any outstanding wages due me, including any outstanding paid time off I might otherwise be eligible to be paid for at the end of my employment. A remaining balance is due to UPMC within 30 days of termination.
- I agree to allow any school or entity that I submit to UPMC for tuition assistance to release to UPMC any information regarding my dependent's enrollment including, but not limited to, registration status, grades, charges, and payments.
- I am declaring the information I am submitting to be correct and accurate. I understand any intentional false statement is considered an act of fraud. I also understand UPMC reserves the right to perform periodic audits on benefit eligibility, requesting the appropriate documentation to verify dependent status.

 Staff Member Signature

 Date