

Instructions for Completing the Dependent Tuition Assistance Request Form

Read this form and the accompanying tuition information found on the UPMC Infonet. 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 (except while away at school, if applicable)
 - ✓ 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.

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 paycheck following processing. Note: Dependent children must maintain 12 credits throughout the term.

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 indicating amount of tuition
 - Must specify exact amount of tuition, fees, and other charges as well as detail 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 tax policies for tuition assistance. Assistance received by staff members for dependents is taxable. Your reimbursement will be less federal, state, and local taxes.

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 and any remaining balance is paid directly to UPMC within 30 days of termination.

DEPENDENT TUITION ASSISTANCE REQUEST FORM

See instructions on page 1 for completing this form and for details about required documentation to supply with this form. Type or print legibly and complete all information in black or blue ink. Do not use abbreviations or acronyms. **Must submit within 6 months after end of term.**

Staff Member Information

Name: _____ Employee ID#: _____ Social Security #: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Home Phone: _____ Daytime Phone: _____
 Department: _____ Position: _____
 Hire Date: _____ Job Status: Full-time Flex Full-time Job Share Regular Part-time
 Union Employee: Yes No Payroll Frequency: Bi-weekly Monthly

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 (must be an approved healthcare major) School: _____

Program/Course Information

Do not use abbreviations or acronyms.

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: ____/____/____

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.

Invoice/itemized bill
 Proof of payment
 Proof of successful completion
 Proof of qualifying dependent status (only needed if not already supplied - refer to Proof of Qualifying Dependent Status in reimbursement checklist on Page 1)

- I understand that UPMC expects me to remain an active, eligible staff member for 12 months following the completion of a course in which I received tuition assistance. I agree to repay any tuition reimbursement received for courses completed in the preceding 12 months prior to termination or if changed to an ineligible status. Repayment will be taken from my final check and remaining balance will be made directly 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