

Instructions for Completing the Staff Member 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** 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.

Advancement: *The following items must be submitted no later than 30 days after the class start date. Advancement requests received after 30 days are processed as reimbursements.* Advancement is only available for the University of Pittsburgh, Carlow University (CAP/Weekend program), Community College of Allegheny County, Chatham University, and UPMC Proprietary Schools. Allow 4-5 business days for an Advancement Letter to be issued and mailed to your home. Forward the letter to the student accounts office at your school to inform them of your eligibility.

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

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

- Completed and signed 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.
- Class schedule
 - Must have student's name, school, and semester pre-printed on it by the school.
- Invoice/itemized bill
 - Must specify exact amount of tuition, fees, and other charges as well as detail the term, student, and school.
- Official proof of 3rd party payments showing method of payment
 - If you receive grants, scholarships, or other non-repayable funds, you must report the amounts of those payments.

Reimbursement: *The following items must be submitted within 6 months after the course completion/exam date for reimbursement.* Reimbursements can take up to 4 weeks to process and will be issued in the next paycheck after processing.

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

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

- Completed and signed 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 or exam cost
 - 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 (certificate or test results if a certification exam)
 - Must obtain an "A", "B", "C", "P", or "S" grade.
 - If a certification exam, must pass the exam.

A Note About Taxes: UPMC complies with governmental taxing policies for tuition assistance. Upon receipt of tuition reimbursement, your reimbursement will be less state and local taxes. For tuition advancement, state and local taxes are deducted from your paycheck following the end of the semester.

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. Staff utilizing advancement must also repay tuition upon unsuccessful completion of classes. The tuition assistance privilege is suspended while in repayment status.

STAFF MEMBER 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.

Staff Member Information	
Name: _____	Employee ID#: _____ Social Security #: _____
Address: _____	City: _____ State: _____ Zip: _____
Home Phone: _____	Daytime Phone: _____
Department: _____	Position: _____
Hire Date: _____	Job Status: <input type="checkbox"/> Full-time <input type="checkbox"/> Flex Full-time <input type="checkbox"/> Job Share <input type="checkbox"/> Regular Part-time
Union Employee: <input type="checkbox"/> Yes <input type="checkbox"/> No	Payroll Frequency: <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly
Program Information	
Program/Course Type: (choose one)	<input type="checkbox"/> Associate's Degree <input type="checkbox"/> Bachelor's Degree <input type="checkbox"/> Master's Degree <input type="checkbox"/> Ph.D. <input type="checkbox"/> Certificate Program <input type="checkbox"/> Non-degree Course <input type="checkbox"/> Non-credit Course <input type="checkbox"/> Challenge Exam/CLEP <input type="checkbox"/> Certification Exam (do not abbreviate): _____ Exam Date: ___/___/___ <input type="checkbox"/> Pre-requisite (Anticipated Major: _____) <input type="checkbox"/> Other: _____
Major: (do not abbreviate)	_____
Semester:	<input type="checkbox"/> Fall <input type="checkbox"/> Spring <input type="checkbox"/> Summer
Semester/Class Dates:	Start Date: ___/___/___ End Date: ___/___/___
Tuition Assistance Type and Documentation Checklist	
Select the type of tuition assistance you are requesting and identify your school. Use the checklist to ensure you are submitting all of the necessary documentation.	
<b style="text-align: center;">Tuition Advancement: <input type="checkbox"/> University of Pittsburgh <input type="checkbox"/> Carlow University CAP/Weekend <input type="checkbox"/> Community College of Allegheny County <input type="checkbox"/> Chatham University <input type="checkbox"/> UPMC Proprietary School	<b style="text-align: center;">Tuition Reimbursement: <input type="checkbox"/> University of Pittsburgh <input type="checkbox"/> Community College of Allegheny County <input type="checkbox"/> UPMC Proprietary School (UPMC owned school) <input type="checkbox"/> Other accredited school (specify): _____
<b style="text-align: center;">Tuition Advancement Checklist: You must submit this form and both of the following items within 30 days from the start of the semester. See page 1 for details. <input type="checkbox"/> Class schedule <input type="checkbox"/> Invoice/itemized bill	<b style="text-align: center;">Tuition Reimbursement 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. <input type="checkbox"/> Invoice/itemized bill <input type="checkbox"/> Proof of payment <input type="checkbox"/> Proof of successful completion

- I understand that UPMC expects me to remain an active, eligible staff member for 12 months following the completion of a course/exam in which I receive tuition assistance. I agree to repay any tuition advancement or reimbursement received for courses/exams completed in the preceding 12 months prior to termination or a change to an ineligible job status. Repayment will be taken from my final check and any remaining balance will be paid directly to UPMC within 30 days of termination.
- I agree to payroll deductions for the repayment of the total tuition advanced on my behalf for any courses I do not complete successfully including receiving a grade of "D" or less, a "Fail" in a pass/fail course, or not completing the course.
- I agree to allow any school or entity that I submit for tuition assistance from UPMC to release to UPMC any information regarding my 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.

 Staff Member Signature

 Date