

Instructions

Before each term, read the UPMC Tuition Assistance Guidelines and other helpful information found on Infonet by searching “Tuition Assistance” to ensure your clear understanding of benefit qualifications.

The course start date determines its academic year for UPMC tuition benefit considerations (Aug 1- Jul 31).

When submitting your tuition claim, **read** the entire form, neatly **complete ALL items**, and **submit** with required documentation by the deadline to the address or fax above. Avoid delay in processing your claim - please do not submit your information multiple times, send items separately, or include information from more than one term. Timely processing depends on your clear, accurate, and complete submission.

Advancement: *Request advancements up to 30 days after your class start date.* Advancement Letters are issued within 4-5 business days and are mailed to your home (advancement letters cannot be faxed). Forward the letter to the student accounts office at your school to inform them of your eligibility. Advancement is only available for University of Pittsburgh, Carlow University (CAP/Weekend program), Chatham University, Community College of Allegheny County, and UPMC Proprietary Schools.

Advancement Request Checklist:

Each document from your school must include student name, semester, and school (pre-printed by the school).

- Completed and signed UPMC Tuition Assistance Request Form
 - Print a new form from the Infonet each term; a separate request form is required for each term
- Class schedule (must have your 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 show 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 those amounts

Reimbursement: *Request reimbursement within 6 months after the course completion/exam date.*

Reimbursements can take up to 4 weeks to process and are included in the paycheck after processing.

Reimbursement Request Checklist:

Each document from your school must include student name, semester, and school (pre-printed by the school).

- Completed and signed Tuition Assistance Request Form
 - Print a new form from the Infonet each term; a separate request form is required for each term
 - Items from schools with non-standard semesters must indicate the courses being claimed and ensure the school documentation clearly specifies the course for which it pertains - use a separate Request Form, if necessary
- Invoice/itemized bill/proof of exam cost
 - Must specify exact tuition or exam cost, 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 the term was paid. A receipt from the school is only acceptable if it clearly itemizes the amount and source of 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. State and local taxes will be taken at the time of payment for tuition reimbursement or will be deducted from your paycheck following the end of the semester for tuition advancement.

Repayment of Tuition Assistance: Tuition benefits received must be repaid if employment termination or change to an ineligible job status occurs within 12 months from the course completion date. Repayment is taken from your final check (including vested paid time off payout) and any remaining balance is to be paid directly to UPMC within 30 days. Staff utilizing advancement must also repay tuition when coursework is not completed successfully. The tuition assistance privilege is suspended while in repayment status.

STAFF MEMBER TUITION ASSISTANCE REQUEST FORM

See page 1 for full instructions and documentation that must be included with this form. Type or print legibly and complete all information in black or blue ink. Do not use abbreviations or acronyms. Incomplete submissions will be rejected.

Staff Member Information

Name: _____ Daytime Phone: _____
 UPMC Person Number *:

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 Email: _____

* Your UPMC Person Number is available in HR Direct, in Kronos, or from your supervisor.
 It is not found on your employee badge or health insurance ID card.

Program Information

Degree/Course Type: Associate's Degree Bachelor's Degree Master's Degree Ph.D. Pre-requisite
 Certificate Program Non-degree Course Non-credit Course Challenge Exam/CLEP

Degree/Course Details: Major: (do not abbreviate) _____
 Semester: (choose one) Fall Spring Summer (Use a separate Request Form for each semester)
 Semester/Class Dates: Start Date ____/____/____ End Date ____/____/____

Certification Type: Certification Exam Recertification

Certification Details: Certification Name: (do not abbreviate) _____
 Exam/Recertification Date: ____/____/____

Acknowledgement and Submission Guide

Step 1: Identify the type of tuition assistance, your school, and indicate the documents included with this submission.

Each document from your school must include the student's full name, semester, and school (pre-printed by the school).

<p><u>Advancement</u></p> <p>Advancement School: <input type="checkbox"/> University of Pittsburgh <input type="checkbox"/> Community College of Allegheny County <input type="checkbox"/> Carlow University CAP/Weekend <input type="checkbox"/> Chatham University <input type="checkbox"/> UPMC Proprietary School</p>	<p>Advancement Checklist: Submit <u>both</u> the following items along with this form <u>within 30 days from the class start date</u>. See page 1 for details. <input type="checkbox"/> Class schedule <input type="checkbox"/> Proof of actual tuition cost (school invoice where tuition cost is itemized separate from fees and other charges)</p>
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<p><u>Reimbursement</u></p> <p>Reimbursement School: <input type="checkbox"/> University of Pittsburgh <input type="checkbox"/> Community College of Allegheny County <input type="checkbox"/> Certification <input type="checkbox"/> Other accredited school: _____ _____</p>	<p>Reimbursement Checklist: Submit <u>all</u> the following items along with this form <u>within 6 months after the class end date</u>. See page 1 for details. <input type="checkbox"/> Proof of actual tuition/exam cost (invoice where tuition/exam cost is itemized separate from fees and other charges) <input type="checkbox"/> Proof of payment (showing method of payment) <input type="checkbox"/> Proof of successful completion (grade report/certificate)</p>
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Step 2: Review this form and your documentation for completeness, then sign and date the form to acknowledge understanding of the tuition program guidelines; Submit all items to the above address or fax number.

- As detailed in the UPMC Tuition Assistance Guidelines, I understand I must repay tuition assistance received if 1) I do not successfully complete coursework, 2) I do not remain an active, tuition benefit eligible employee for 12 months following course completion, or 3) I receive an overpayment of tuition assistance. I authorize UPMC to deduct the amount owed by means of payroll deduction from my wages (or vested paid time off payout in cases of employment termination) without further authorization from me. A remaining balance is due to UPMC within 30 days of termination.
- I agree to allow any school or entity from which I submit for UPMC tuition assistance to release to UPMC any information regarding my enrollment including, but not limited to, registration status, grades, charges, and payments.
- I am declaring my submission is complete and accurate. I understand any intentional false statement is considered an act of fraud and is punishable up to and including employment termination.

Staff Member Signature: _____ **Date:** _____