

Arbor Acres United Methodist Retirement Community, Incorporated

Educational Reimbursement Application

TO BE COMPLETED BY THE EMPLOYEE:

First Name	M.I.	Last Name	SSN:	Department:	Daytime Phone No.
Current Position:			Department:	Manager's Name:	Phone No.
Institution Enrolled:					
Degree Sought:				Name of course(s) for which reimbursement is requested:	
Describe how course is related to your job or how course will assist your growth at Arbor Acres:					

Is any part of the tuition expense eligible for payment by scholarship or grants? ☐ Yes ☐ No

If yes, how much will be reimbursed from scholarship or grant? \$ _____

Arbor Acres offers educational assistance to full-time employees after six months of employment. To qualify for reimbursement, the course or degree must be job-related (or prepare the employee for other positions available at Arbor Acres) and offered by an accredited school. Prior to enrollment, you must complete an application for educational assistance and submit it to your manager and Talent Arts for approval. If the application is approved, you will be eligible for reimbursement for tuition, books, exam fees, up to a maximum of \$500.00 per semester, with a maximum of \$1,000.00 per calendar year upon successful completion (grade A, B, C or Pass) of the course. You must be a full-time, active employee and have an acceptable performance rating at the time reimbursement is payable to receive payment. Application fees, assessment fees, parking fees and certain other non-tuition expenses are not reimbursable. Also, if any part of the tuition expense for an otherwise eligible course is payable by scholarship or grant, this program will not provide reimbursement of that portion of the cost. Tuition reimbursement may be considered taxable income to you; therefore you may want to consult your tax preparer or accountant.

Instructions: Complete application prior to beginning of course. Forward to manager for approval. Send to Talent Arts for final approval. Approved application will be returned to you to retain until successful completion of course. At completion of course, attach a copy of the tuition statement, other receipts and final grade reports to approved application and send to Talent Arts to be reimbursed for eligible expenses up to semester or calendar year limits.

Agreement

In consideration of my employment and the agreement by Arbor Acres to pay the costs of educational expenses up to \$500/semester (maximum of \$1000/calendar year), I agree:

1. If I resign during the twelve month period after completion of training, that I will reimburse Arbor Acres for any educational reimbursements paid to me during the 12-month period.
2. I authorize Arbor Acres to withhold from my pay any monies due to me at the time of termination to fulfill this obligation.

_____ Employee Name	_____ Date	_____ Manager Approval	_____ Date
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TO BE COMPLETED BY TALENT ARTS:

Eligibility: ☐ up to \$1,000 per calendar year ☐ course not eligible for reimbursement

\$ _____ expenses currently eligible for reimbursement \$ _____ balance remaining for calendar year

_____ Talent Arts Signature	_____ Date	_____ Employee Number	_____ Pay Period Processed
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