



## Tuition Reimbursement Program Policy

### INTRO

The following policy has been created as a benefit to assist employees pursuing degrees through accredited education programs. The classes and degrees must be approved *in advance* by the employee’s manager, prior to the course start date. All courses and degrees being pursued must be job-related or company related. **Professional certifications must be approved by your manager and submitted through Chrome River as a personal business expense. Certifications are not eligible for tuition reimbursement.**

This document will outline the requirements for eligibility, the tuition reimbursement process, the reimbursement amounts available, and options for non-standard training expense reimbursements. Employees are responsible for submitting the required documentation by the deadlines, as specified in this document. You must submit eligible completed course classes for reimbursement anytime within the calendar year. Failure to do so will result in denial.

### REIMBURSEMENT ELIGIBILITY

Regular full-time and regular part-time employees are eligible. Interns, co-ops, seasonal, and temporary employees are not eligible for the tuition reimbursement program.

### Employment Eligibility

To be eligible to receive tuition reimbursement, employees must be active and employed for the full duration of courses. Employees must be employed at time of payment. Once the maximum eligible reimbursement is met in the calendar year (January – December), an employee will not become eligible again for reimbursement until a new calendar year starts on January 1. The reimbursement schedule is below -

<b>Undergraduate Degree</b>	<b>Maximum Calendar Year Reimbursement Amounts</b>
Maximum Reimbursement Amount	\$2,000.00 (full-time) \$1,250.00 (part-time)
<b>Graduate Degree</b>	<b>Maximum Calendar Year Reimbursements Amounts</b>
Maximum Reimbursement Amount	\$4,000.00 (full-time) \$2,500.00 (part-time)

Expenses paid through grants, scholarships, or funded through other means are **not eligible** for reimbursement, but tuition expenses paid through student loans are eligible. If an employee receives a scholarship or grant that covers tuition but not required textbooks, that employee is eligible to receive reimbursement **only** for the required textbooks.

## Expense Eligibility

Eligible items for reimbursement include (but are not limited to) the following:

- Tuition
- Lab/class fees
- Required text/software expenses
- Entrance exam fees

**Ineligible** items for reimbursement include (but are not limited to) the following:

- Parking or transportation expenses
- Testing center fees
- Late Fees
- Application fees
- Supplies/Optional software
- Professional Certifications
- Non-required text expenses or materials

Questions on eligibility should be directed to Espresa, Ancestry's reimbursement administrator at support@espresa.com. To be eligible for reimbursement, the employee must achieve a grade of "C" or better for undergraduate courses or a grade of "B-" or better for graduate courses ("C-" or lower, and "B-" or lower are ineligible respectively). A "pass" or "fail" grade will be accepted if a letter grade is not available. All classes must be pre-approved by the employee's manager.

Tuition Reimbursements are calculated per course date completion schedule, (please see table 1).

## Events Resulting in Ineligibility

An employee will not be eligible for tuition reimbursement if he/she withdraws from a previously approved course, or the course is canceled.

An employee will not receive tuition reimbursement if their employment ends prior to completion of an approved course.

## Terminating after receiving reimbursement

Reimbursed expenses for **all** courses may become the employee's sole responsibility, in the event that employment ends within twelve months of any reimbursement paid according to the chart below.

<b>Employee Terminates Between:</b>	<b>Amount Owed to Ancestry for each reimbursement received</b>
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1 - 6 months after receiving reimbursement	Pay back 100% of reimbursement received
6 - 9 months after receiving reimbursement	75% of reimbursement received
9 - 12 months after receiving reimbursement	50% of reimbursement received
After 12 months of receiving reimbursement	0% repayment

**Example:** Employee receives \$2,500 tuition reimbursement on January 30 and then terminates on June 29, the employee would owe (to Ancestry.com) \$2,500.

If an employee terminates after more than 6 months, but less than 12 months after receiving reimbursement, the amount to be returned would be prorated based on the number of full months between the reimbursement date and the termination date.

**Example:** Employee receives \$2,500 tuition reimbursement in January. If the employee terminates from July-December, he or she would owe a prorated amount of the \$1,250.

$\$1,250 / 6 \text{ months possible} = \$208.33$  per month remaining to full year from reimbursement. The schedule below shows what the employee would owe if he/she terminated in that month:

**APPLICATION AND REIMBURSEMENT PROCESS**

Prior to courses beginning, employees must fully complete the Education Expense Reimbursement Application (located on the [Ancestry Benefits website](#)). A completed application consists of the following:

- Employee first and last name
- Course names and credit hours listed
- Employee signature and date
- Authorized name and signature by employee’s manager
- All authorized dates and signatures executed prior to the course start dates (Authorized dates that are after course start dates are cause for denial)
- You are eligible to submit completed course classes for reimbursement anytime within the calendar year.

Once an employee has completed the application as outlined above, the employee must submit the application completed in its entirety and include: official summary of charges from Institution, grades with course descriptions, tuition reimbursement form on [Espresa](#) by the appropriate deadline (see table 1).

Grade Report (or Unofficial Transcript from Institution) must include the following:

- Student Name
- Institution Name
- Quarter/Semester/dates of courses
- Course names and letter grade for each course
- Course names on grade report or unofficial transcript, must match course names listed on original application. (Courses not matching original application will not be reimbursed)
- Number of credits for each course

**Official Summary of Charges from Institution must include the following:**

- Student Name
- Institution Name
- Quarter/Semester/dates of courses
- Charges (tuition, student fees, lab fees, late fees, etc.)
- Payments (loans, credit card/check, etc.)
- Credits (Pell Grant, Financial Aid, Grants, Scholarships)

Employees must attach all items as back up to the Tuition Reimbursement Form. If items are not attached, application will be denied.

After an employee has electronically submitted all items with Tuition Reimbursement application and Tuition Reimbursement Form to [Espresa](#), it will be reviewed and if approved will be submitted to payroll for payment processing.

Refer to Table 1 to see what month your final course completion date falls between and have all items approved and submitted to [Espresa](#) by the deadline listed below. Once grades and tuition receipts are received by [Espresa](#), the tuition reimbursement will be issued on the payroll date indicated in the pay schedule Table 1.

**Tuition Application & Reimbursement Forms & Pay Schedule (Table 1)**

<b>Course Date Completion</b>	<b>January 1 – March 30</b>	<b>April 1 – June 30</b>	<b>July 1 – September 30</b>	<b>October 1 – December 31</b>
<b>Tuition Application &amp; Reimbursement Form due to Espresa</b>	April 5	July 5	October 5	January 5
<b>Tuition Reimbursement Payment Date</b>	April 30	July 31	October 31	January 31

Full documentation should be submitted electronically to [Espresa](#).