

Tuition Reimbursement Request & Form

Guidelines and Instructions for Completion

ConvaTec offers tuition reimbursement on an exception basis to provide financial assistance to employees who, through their own initiation and desire for self-improvement, participate in accredited educational programs which will be mutually beneficial to CVT and the employee.

Approved tuition reimbursement requests will be approved for reimbursement as follows:

- Grade “A” and Grade “B” equals 80% reimbursement.
- Grade “C” or Grade “D” and below will not be reimbursable.

Instructions for Completion

- Prior to beginning the semester, the employee completes the **white** areas of the Tuition Reimbursement Form and submits it to his/her immediate manager for approval.
- The manager should coordinate with their respective their manager for approval.
- An e-mail approval will be forwarded to Sharon Vance, Benefits Manager, by the employee’s manager.
- Once approved, the application should be returned to the employee to hold until the coursework is completed.
- Upon completion of coursework, the employee completes the **shaded** areas of the Tuition Reimbursement Form, and submits the required documentation (completed form, grades, receipts, etc.) to his/her immediate manager for review and approval.
- The immediate manager reviews, approves, indicates the amount due for reimbursement and forwards the application to their immediate manager or HR Business Partner for review. *(Note: the approval is required by a manager who has been granted proper Grant of Authority (GOA) to cover the amount of the reimbursement)*
- The employee’s one-over manager or HR Business Partner reviews and signs the form before forwarding to Sharon Vance for processing. Reimbursement will be made generally within two pay periods of receipt of the application and is limited to a max of \$5,250 per calendar year.



Tuition Reimbursement Application (Effective 1/2016)

White areas to be completed by Employee and Supervisor PRIOR to beginning courses. Shaded areas to be completed AFTER course completion.

Employee Name (First, MI, Last)	Last 4 digits of Social Security Number	Date of Hire
Name of School	Coursework <input type="checkbox"/> Undergrad/Associates & Bachelors <input type="checkbox"/> Graduate/Masters <input type="checkbox"/> Certificate/Other	Major
Credits Required for Degree	Credits to Date	Anticipated Graduation Date

To be completed prior to beginning courses				To be completed after course completion					
Course Name	Describe How Course Relates to Current Position	Credit Hours	Course Start /End Dates	Grade Earned	Cost of Tuition	Fees	Total Cost Per Course	Percentage of Reimbursement (80%)	Total Reimbursement (Total Cost Per Course x Percentage of Reimbursement)
1)								80%	
2)								80%	
Total for all courses								80%	

The following certification is required from all individuals claiming preferential income tax withholding treatment under the Internal Revenue Code. Failure to complete the Certification may result in the delay of reimbursement payment and the occurrence of adverse income tax withholding.

INTERNAL REVENUE CODE SECTION 127 CERTIFICATION (\$5,250 exclusion): I hereby certify under penalties of perjury that the above mentioned educational course(s) has a reasonable relationship to the ConvaTec business or is required as part of a degree program. As such, reimbursement of applicable costs is subject to preferential tax treatment under IRC Sec. 127. I agree to retain documentation supporting this contention and will supply the Company with this documentation upon request.

Employee Signature: _____ Date: _____

TUITION REIMBURSEMENT AGREEMENT: I agree that I will continue to work for ConvaTec for a period of twelve months from the date on which I am reimbursed under the Tuition Reimbursement Policy. I understand that if I voluntarily resign or am terminated for cause, I will immediately, unconditionally and without any right or claim of setoff, pay to ConvaTec upon demand the full amount of my tuition and fees reimbursed to me over the prior 12 months. I hereby authorize ConvaTec to recover all or part of such tuition or fees upon my resignation. Where legally permissible, I authorize ConvaTec to recover such monies by payroll deduction.

Employee Signature: _____ Date: _____

SUPERVISOR VERIFICATION AND CERTIFICATION: I hereby certify under penalties of perjury that the above employee is a subordinate over which I have direct supervisory control. I further certify that I am familiar with the employee's educational endeavors, have reviewed the assertions made by the employee in this document, and hold them to be truthful and correct to the best of my knowledge.

Supervisor Signature: _____ Date: _____

To be completed at conclusion of coursework, with appropriate documentation

SUPERVISOR REIMBURSEMENT APPROVAL: Approval is required by a department supervisor/manager who has been granted proper financial approval limits to cover the amount of reimbursement. Upon approval, please forward original approved application ONLY to your Sharon Vance, Benefits Manager; retain receipts for your records.

Manager Approval: _____ Amount: _____ Date: _____

HRPB or 2nd level Manager Review: _____ Date: _____