

TUITION ASSISTANCE FORM

Prior to beginning each course, complete **Section I** of this form and submit to your immediate supervisor for review and pre-approval. After successfully completing the course, complete **Section II** below, obtain signatures of appropriate individuals, and submit to Human Resources along with the relevant grades and receipt(s).

Section I. Application for Tuition Assistance

Employee Name:	Degree Sought:
Job Title:	Area of Discipline:
Dept # and Name:	Institution Name:

Course # and Title:	
Course Description/Purpose:	
Course Start Date:	Expected Completion Date:
Course Day(s)/Time(s):	Estimated Tuition Reimbursement:

Signature below confirms agreement with the following:

- The course is job related and will either add to the Employee's effectiveness in his/her present assignment or contributes to the Employee's overall development and is beneficial to the Company.
- I have read & understand the requirements of the Tuition Assistance Program and affirm that this application complies with the program.
- I certify that the information provided is correct to the best of my knowledge.

Employee Signature

Date

Supervisor Signature

Date

Section II. Request for Tuition Reimbursement

Original documents (grade and receipts) must accompany this request for processing. Reimbursement will not be made unless all receipts are attached. Please retain duplicate copy for your records.

Course Final Grade:	Course Tuition:
	Eligible Fees:
	Total Tuition Request:

- I hereby request reimbursement for the above class.
- I understand that I am solely responsible for payment of taxes as a result of any reimbursement for education that may be found to be taxable.

Employee Signature

Date

APPROVALS:

Supervisor Name

Supervisor Signature

Date

Department Director/VP Name

Department Director/VP Signature

Date

Human Resources Name

Human Resources Signature

Date

EMPLOYEE TUITION ASSISTANCE PROGRAM

PURPOSE

ZOLL believes that formal education has a positive impact on an employee's contribution to the Company. It supports self-development and educational efforts by providing reimbursements for many of the expenses associated with continuing education courses. The purpose of this program is to encourage self-development by employees and define eligibility for financial assistance to employees who take work-related courses on their own time.

ELIGIBILITY

- An employee's status is regular full-time.
- Course(s) will directly help the employee on his/her current job in the organization and/or will prepare the employee to take on further responsibility within the organization.
- Courses must be part of a degree or diploma program at approved and accredited educational institutions.

POLICY

- Eligible employees may receive non-taxable reimbursement up to the maximum of \$5,250 per calendar year.
- Any educational assistance amount above \$5,250 per calendar year will be included in taxable income subject to income tax and FICA withholding.
- Tax treatment of tuition reimbursements will be assessed at the time they are paid, not based on the completion date of the course.
- Tuition reimbursement is processed through Payroll and employee requests for reimbursement must be received by HR no later than the non-payroll Friday for payment to be processed in our pay date the following Friday.
- Expenses eligible for 100 percent reimbursement include tuition and fees for college and university courses.
- Company reimbursement will be reduced by any other financial assistance that does not have to be repaid (such as state or federal grants). Reimbursement is limited to 100 percent of actual expenses.
- Any employee, who receives a grade below a B-, drops the course or resigns from his/her job, will not be reimbursed.
- Neither participation in this program nor education achievement is considered a guarantee for job retention or advancement.

PROCEDURES AND APPROVAL

BEFORE THE COURSE STARTS

Employee: Discusses development plans, training needs, and education assistance possibilities with supervisor or department manager. Prior to enrolling in the course, the employee needs to complete *Section I. of Tuition Assistance Form* and provides it to his/her supervisor for approval.

Supervisor/Manager: Assess the cost, degree and course, taking into account the employee's current and future assignments and potential impact on the employee's work responsibilities and approves application if employee is eligible and course is appropriate, sign and return the *Tuition Assistance Form* to the employee.

AFTER THE COURSE ENDS

Employee: Completes *Section II. Request for Tuition Reimbursement of Tuition Assistance Form*, obtains signatures of the appropriate individuals and remits to Human Resources along with:

- copy of the course bill
- grade transcript
- proof of payment

Human Resources: Upon receipt of Tuition Assistance Form and proper documentation listed above, Human Resources reviews and, after approval, forwards report to Payroll for payment to the employee.