

Services & Trades Reimbursement Form

Tuition Reimbursement Plan Non-Harvard Course Reimbursement

Harvard University Benefits

See Back for Guidelines

Harvard ID: _____ Department: _____

Name: First _____ MI _____ Last _____

Home Address: _____ Daytime Phone: (____) _____

City: _____ State: _____ Zip Code: _____

Date of Hire/Appointment: _____ Years of Service: _____

Employment Status: Hourly

Union Affiliation: Carpenters (Local 51) Electrical Workers (Local 103) Plumbers (Local 12)
 Food Services (Local 26/SWU/Other HUPA HUSPMGU SEIU
 Operating Engineers (Local 877)

I hereby certify that 1) I meet the eligibility requirements as stated on reverse side, and 2) will not be covered by any other employer plan or any other person. My employer does not accept responsibility for direct payment to any individuals other than the employee. I have read and understand the information on this form.

Signature of Staff Member Date

Signature of Immediate Supervisor or Personnel Officer Date

1. Semester: Fall Spring Summer Full Year Course
2. Type of Credit: License* Certificate* Undergraduate (*must apply toward a degree*)
 Graduate Doctoral (*special rules apply*)

3. School/Program offering the course: _____

4. Course Number: _____ Credit Hours: _____

Course Title: _____

Course Start Date: _____ Course End Date: _____

5. Why this course is needed:
- Required for a degree
 - Upgrade skills/knowledge necessary for current job
 - Upgrade skills/knowledge necessary for another job at the University
 - Requested by Supervisor

6. Total Course Cost: \$ _____ (tuition only)

7. Grade: _____ (If not available at time of application submission, may be supplied to Crosby Benefit Systems within 60 days after the end of the course)

Mail to Crosby Benefit Systems, 27 Christina St, Newton, MA 02461
or Fax to 617 928 0001

*Licensing and certificate programs must be taken at an accredited institution and must support the core duties of an internal Harvard position.

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Guidelines for Completing Tuition Reimbursement Plan Non-Harvard Reimbursement Request

TRP is available for Degree, License or Certificate courses outside of Harvard to Hourly staff who:

1. work at least 17.5 hours per week if Hourly HUPA or HUSPMGU; **or** work at least 20 hours if Hourly Dining Services; or work more than 20 hours if Hourly Custodial Services, Electricians & Carpenters (ATC), or Arnold Arboretum; and
2. are paid on the regular payroll; and
3. who have 6 months of service prior to the start of the course.

To be eligible for TRP coverage, a course must meet the following criteria. The course must be:

1. taken at an accredited institution;
2. taken for academic credit and for a letter grade;
3. job-related (unless it is an undergraduate course taken toward the completion of an associate's or bachelor's degree; completion of an undergraduate degree is considered job-related regardless of subject matter
4. Certificate programs must support the core duties of an internal Harvard position.

Complete one form for each course.

The completed form must be submitted to Crosby Benefit Systems within 60 days after the end of the course to receive reimbursement. *If you are unable to obtain the required information within the 60-day period, you must contact Harvard Benefits prior to the deadline.*

Submit the following paperwork:

1. completed TAP form;
2. a copy of the course cost (bursar's bill or page from the catalogue);
3. a receipt showing the specific course was paid;
4. grade or document proving completion of the course and grade received. If a certificate program does not give out grades, proof of completing the course (such as a copy of the certificate or a letter from the instructor attesting the student successfully completed the course) will be considered proof of passing

All paperwork should be mailed to Crosby Benefit Systems, 27 Christina St, Newton, MA 02461 or faxed to 617 928 0001. Tuition requests are processed semi-monthly. For completed requests submitted by the 15th of the month, checks will be issued by the last day of the month; for completed requests submitted by the last day, checks will be issued by the 15th of the following month. Note: Reimbursement checks will be mailed to your home address.

To certify your employment and eligibility for TRP, you must sign the TRP form and obtain the signature of your immediate supervisor or the signature of your area personnel officer.

Checklist:

1. On the front of the form, check the semester in which you are taking the course;
2. Check to indicate the type of credit;
3. List the school/institution where you are taking the course.
4. Provide the complete course title and credit hours listed in the brochure/catalogue. Fill in the beginning and ending dates of the course.
5. Enter the tuition for the course. Most staff are eligible to receive 90% of tuition, up to a maximum reimbursement of \$5,250 per calendar year (January 1 - December 31). If you have reached the reimbursement maximum, please forward your information to HUCTW to apply for an Education Fund award.

Please see the Tuition Plan section of HARVie (<http://hr.harvard.edu/tuition-assistance>) for additional information regarding eligibility, wait periods, credit limits, and plan design, or contact the Benefits office with questions at 617- 496-4001.