

NY/NE Regional & Local Work & Family Educational Reimbursement Program

2022



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CWA

IBEW



Policy Statement

Recognizing the mutual benefits derived from continued education and increased work competence, the joint NY/NE Work and Family Committee wishes to establish a reimbursement program to enable covered employees and their eligible dependents to defray the costs associated with text books/course materials related to secondary education. Participation in this program is voluntary.

Eligibility Criteria

In order to participate, an employee must be employed at Verizon in a capacity that is covered by the NY/NE Work and Family Committee. The employee must be a NY/NE CWA, IBEW 2213, NY/NE Service Company employee or Verizon NY/NE management employee employed at the time the reimbursement is sought.

Expenses incurred by eligible dependents of the employee are also eligible for reimbursement under the program. In order to qualify, **the dependent must be a tax-qualified dependent under IRS guidelines and listed on the employee 1040 IRS tax form.**

Areas of Study Which Qualify for Payment

The following types of secondary educational courses (beyond high school) and qualifying costs are covered up to the biannual maximum limit when offered by an eligible educational institution that is accredited by an agency listed below:

- JOB-RELATED STUDIES from which knowledge can be gained that will enable the dependent to seek employment post-study.
- CAREER-RELATED STUDIES that prepare for advancement in the dependent's current field or a field in which the dependent may seek employment in the future.
- DEGREE RELATED STUDIES which are part of an approved job-related or career-related degree including individual non-job related and non-career-related courses which are part of the approved degree program.
- TECHNICAL/VOCATIONAL STUDIES that may enable the dependent to learn a trade or seek employment in a trade in the future.

Approved Educational Organizations

The course of study must be at an educational institution accredited by one of the organizations listed in Appendix A of Verizon Tuition Assistance Plan for Mid-Atlantic and Northeast Associates. For technical/vocational studies, there must be accreditation from a national organization such as the Accrediting Commission of Career Schools and Colleges (ACCSC) and the Council on Occupational Education (COE).

Covered Expenses

Required textbooks/course materials including shipping and handling (i.e. access codes, e-books, software, and workbooks) may be reimbursed under the program.

Reimbursement Amount

Each employee will be eligible to seek reimbursement for up to \$600 in covered expenses, pre calendar year. The initial year of the program will be 2022, and expenses incurred in 2022 prior to launch date will be eligible for reimbursement. Expenses incurred in calendar year 2022 can be submitted for reimbursement no later than January 13, 2023. Reimbursements will post February 24, 2023.

Subsequent expenses can be reimbursed in subsequent years with similar timing. For calendar 2023, the expenses can be submitted no later than January 12th, 2024. Reimbursements will post February 23rd, 2024.

Each employee is eligible for up to \$600 in reimbursement per annual period, regardless of the number of eligible dependents. The \$600 may be attained by aggregating expenses across multiple dependents. Expenses incurred in one year and not reimbursed cannot be carried over for reimbursement in a subsequent year.

The administrator will require reasonable documentation of expenses in order to process reimbursement, including documentation of eligible expense and related enrolled course that the expense supports. Documentation submitted for reimbursements must be in the name of the employee and/or eligible dependent(s). This might include documentation of course enrollment along with materials expenses that reasonably supports that course enrollment.

Note: While the Regional Work & Family Committee intends to continue with this program, the Regional Work & Family Committee reserves the right to terminate or amend the plan at any time funds are anticipated to be depleted.

2022 NY/NE Educational Reimbursement Form



Please Print Clearly and Complete Entire Form

Last Name: _____ First Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Employee ID _____ Email: _____ Cell Phone: _____

Work Address: _____

CWA Local (write local #) _____ IBEW Management

Dependents Name: _____ Type of course (✓ one) _____ online _____ in person

Name of Continued Education:

Educational Expense is for: Employee Dependents

Effective Start Date: _____

Effective Completion Date: _____

Please list any other cost associated with the course below

Description	Cost

Employee Signature: _____

Date: _____

Please submit all invoices and proof of payment to support your reimbursement request. By signing and submitting application, I certify that the information that I have provided on this form is true and accurate. I further understand that supplying false information on this form may jeopardize my continued participation in the NY/NE Work & Family Fund.

Send form and receipts to:
NY/NE Regional Work & Family Committee c/o: Fund Administrator
120 Hicksville Road, Room 200-A
Massapequa N.Y. 11758