

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

2023



verizon<sup>v</sup>

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 textbooks related to secondary education. Participation in this program is voluntary. **This is not a tax-free program.**

## **Eligibility Criteria**

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.

Management employees are not eligible for this Educational Reimbursement Program, only their respective dependents or spouse who meet the current eligibility criteria.

Expenses incurred by eligible dependent(s) or spouse of the employee are also eligible for reimbursement under the program. To qualify, **the dependent must be a tax-qualified dependent under IRS guidelines and listed on the employee IRS-1040 tax form. (Employee must submit page 1 of their IRS-1040 Tax form along with a copy of a document from the school showing the spouse or child(s) attends that school)**

## **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 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, per calendar year. Expenses incurred in the calendar year 2023 can be submitted for reimbursement no later than January 12<sup>th</sup>, 2024. Reimbursements will post February 23<sup>rd</sup>, 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 and/or spouse. 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 expenses and related enrolled course that the expense supports. Documentation submitted for reimbursements must be in the name of the employee, spouse and/or eligible dependent(s). ***Employees must include a document from the school stating that the child(s)/ spouse attends that school.*** This might include documentation of course enrollment or student transcript along with materials expenses that reasonably support 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.

**Participation in this program is voluntary and only one Verizon employee per household can apply for this reimbursement program.**

**\*\*\*\*\* DO NOT SUBMIT REIMBURSEMENT FORM UNTIL AFTER SEPTEMBER 15<sup>TH</sup> 2023. \*\*\*\*\***

**2023 NY/NE Educational Reimbursement Form** *Do Not Submit Form Until After September 15<sup>th</sup>*



**Please Print Clearly and Complete Entire Form**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Employee ID \_\_\_\_\_ Email: \_\_\_\_\_ Cell# \_\_\_\_\_

Work Address: \_\_\_\_\_

CWA Local (write local #) \_\_\_\_\_  IBEW  Management

Dependents/Spouse Name: \_\_\_\_\_ Type of course (✓ one) \_\_\_\_\_ online \_\_\_\_\_ in person

Name of Continued Education: \_\_\_\_\_

Educational Expense is for:  Employee  Spouse  Dependent(s)

Effective Start Date: \_\_\_\_\_

Effective Completion Date: \_\_\_\_\_

**Please list any other cost associated with the course below including book titles**

Description	Cost

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Please submit all invoices and proof of payment to support your reimbursement request as well as page 1 of your IRS-1040 tax form.**

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: Beverly Steele, Fund Administrator  
 120 Hicksville Road, Room 200-A  
 Massapequa N.Y. 11758