**Contoso Tuition Assistance**

https://contosohr.com/Contosobenefits/Home/Financial/Financial-Assistance-Tools/Tuition Assistance

**HOW THE PROGRAM WORKS**

The Tuition Assistance Program provides financial assistance to eligible employees for undergraduate and graduate coursework at any regionally and nationally accredited institutions recognized by the US Department of Education, for college-level credit related to the business of Contoso. You can use the program in the pursuit of a degree, but you don’t have to. Individual courses are allowed if they receive college level credit and are related to the business of Contoso.

Support

The Program provides reimbursement of tuition and other related out-of-pocket expenses from a centralized US Benefits budget, not from an employee's cost center, and is managed by ContosoEdAssistance. For each calendar year, the maximum reimbursement amounts provided are: Corporate • $5,250 for undergraduate coursework • $10,000 for a combination of undergraduate and graduate courses • $10,000 for graduate coursework To participate, you must apply for assistance through ContosoEdAssistance within 30 days of starting your course which includes obtaining support from your manager. You can submit one application for up to five courses per term/semester. After you complete your course(s), you can upload your passing grades and receipts to ContosoEdAssistance and request reimbursement within 60 days of the course end date.

IMPORTANT YEAR-END PROCESS:

Tuition reimbursement is applied to the year when it is processed, not when you take the course. This affects your tax and benefit cap. You have two options for courses that end in December: • Option 1: If you want your reimbursement to count for the current calendar year, upload receipts before December 6. You will receive your reimbursement in the December payroll. • Option 2: If you want your reimbursement to count for the next calendar year, upload your receipts after December 6 and within 60 days of the course end date. You will receive your reimbursement in 1-2 pay periods. Academic and College Finance Advising You can get free advice and support from ContosoEdAssistance's academic and college finance advisors. Your plan will include program comparison and cost-saving tips. To schedule a free appointment, contact ContosoEdAssistance at (855) 500-8878 between 5:00 AM and 5:00 PM, Pacific Standard Time (PST), Monday through Friday. 2 Tuition Discounts – ContosoEdAssistance Education Network • You can save money by choosing a school in the ContosoEdAssistance Education Network • These schools offer discounts from 5 - 20 percent on tuition and fees. Some of them also offer discounts to your family members. • The education network includes over 220 accredited institutions, both on campus and online. To see the list of schools and discounts, go to ContosoEdAssistance Education Network. Eligible and Ineligible Coursework The Tuition Assistance Program covers courses and degree programs at regionally and nationally accredited institutions recognized by the US Department of Education for college level credit. Online courses from these institutions also qualify. The program also covers English as a Second Language (ESL) and American Sign Language (ASL) courses at accredited institutions. The program does not cover continuing education courses (CEU), professional certificates, seminars, conferences, or courses that do not assign college-level credits. You may be able to get reimbursement for these through your group's training budget if your manager approves. Tax Considerations Undergraduate and graduate coursework is tax-free if it is related to your current job. You may have to pay tax on tuition reimbursement if the coursework is categorized as not related to your current job. This is based on IRS rules. Courses are categorized as follows: • Non-taxable: Courses that maintain or improve the skills used or required by your present job • Taxable: Courses that qualify you for a new position To determine if a course/expense is job-related and therefore NOT subject to taxation, you will be asked one job-related question during application submission. If the coursework is taxable, Contoso Payroll will withhold taxes on the same paycheck as the reimbursement. Tuition reimbursement is supplemental income and is taxed at the supplemental rate per IRS regulations. Note: Typically, the federal supplemental rate is 22 percent.

WHO IS ELIGIBLE

To participate in the Tuition Assistance Program, you must meet the following eligibility criteria: • Be a full-time or part-time Contoso employee on the U.S. payroll (U.S. benefits eligible) for the duration of the course. • Be an active employee at the time of reimbursement. • If your employment with Contoso ends before completing the course and before reimbursement is paid, tuition benefits will not be available after your termination date. • Obtain manager support prior to submitting your application for tuition assistance. This includes developing a plan to support both the learning and the work requirements • Submit a new application required for each course with a new start date. • Start your coursework after your Contoso hire date. • Interns are not eligible for Tuition Assistance.

ENROLL IN THE PROGRAM

To enroll in the Tuition Assistance Program, you must certify that I (employee) meet the following eligibility criteria: • I have confirmed with my manager that we have discussed my participation in the program and have developed a plan to support both my learning and work requirements • My hire date is prior to the course start date • I am a regular, active employee and meet the eligibility requirements contoso.sites/TuitionProgram/ • I have met performance expectations for my role and have not received the Lower Impact than Expected (LITE) indicator in my last Connect. • I certify the above degree/course is directly related my current work assignment and career development at Contoso, and it is a part of my development plan as discussed with my manager. Important: The documentation you provide to support tuition reimbursement must be true, accurate, and complete to the best of your knowledge. Provision of untrue, inaccurate, or incomplete information, or falsification, misrepresentation or omission of facts or information may, at the company's sole discretion, result in the denial or repayment of tuition reimbursement benefits and discipline, up to and including termination. 1. Enroll in the Program To enroll, you need to apply for assistance and get manager approval through ContosoEdAssistance for each course. You must do this within 30 days of the course start date. Before you start, you may want to use the free advising services from ContosoEdAssistance. 2. Submit an Application for Approval Submit your application via ContosoEdAssistance within 30 days of the course start date. You can submit one application for up to five courses per term/semester. Only include courses with the same start and end dates on the same application. This includes obtaining your manager's support. Then you will get an email confirmation.

Request Reimbursement

After you complete your course(s), upload passing grades and receipts to ContosoEdAssistance and request reimbursement within 60 days of the course end date. You will get email notifications about the status of your application. After your request is approved, you will get your reimbursement in your paycheck within two pay periods. If you need to make a change to your application, contact ContosoEdAssistance at (855) 500-8878. 5 ELIGIBLE EXPENSES The Tuition Assistance Program covers individual courses and degree programs at regionally and nationally accredited institutions recognized by the US Department of Education for college level credit. Online courses from these institutions also qualify. The following are the regional accreditation organizations in the US: • Middle States Association of Colleges and Schools • New England Association of Schools and Colleges • Higher Learning Commission (formerly the North Central Association of Colleges and Schools) • Northwest Commission on Colleges and Universities • Southern Association of Colleges and Schools • WASC (Western Association of Schools and Colleges) Senior College and University Commission The following are the national accreditation organizations: • Distance Education Accrediting Commission (DEAC) • Accrediting Council for Independent Colleges and Schools (ACICS) • Accrediting Commission of Career Schools and Colleges (ACCSC) • New York State Board of Regents, and the Commissioner of Education (NYSED-COE) • Accrediting Council for Continuing Education and Training (ACCET) • Council on Occupational Education (COE) To learn more, contact the school you plan to attend, or visit the following: • Council of Higher Education Accreditation (CHEA) • U.S. Department of Education Ineligible Coursework Continuing education courses (CEU), professional certificates, seminars, and conferences aren't eligible for reimbursement through the Tuition Assistance Program. However, you may be eligible for reimbursement through your group's training budget if your manager approves the request. Transcript services that award college-level credit from a non-accredited college or university also don't qualify for the program. Tip: Ensure your request is not available already for free via Viva Learning with 10,000+ courses to choose at contoso.sites/GetLearningApp or free on CONTOSO Library (ex. New York Times, Wallstreet Journal, Harvard Business Review, Financial Times). Also note that you can expense some Personal Development and Skills Development via Perks+. Tuition Expenses 6 The Tuition Assistance Program provides reimbursement for certain course-related out-of pocket expenses. Reimbursable business-related tuition out-of-pocket expenses include, but are not limited to: • Tuition fees for courses and certifications that earn college level credit (certifications must earn college level credit to be reimbursable.) This includes reimbursement for English as a Second Language (ESL) and American Sign Language (ASL) coursework, when taken at an accredited institution (all reimbursement and other Program guidelines will apply). • Required books, including applicable tax (standard shipping and handling fees for books are covered; expedited shipping and handling fees are not covered) • Mandatory registration fees • Required lab fees, technology fees, online fees, course fees, registration fees, and distance learning fees • Software required for coursework, as mandated by the professor • College Level Examination Preparation (CLEP) testing • Challenge exam options (DANTE and UEXCEL) • Out of state fees and surcharges • Thesis and dissertation fees • Graduation fees • Other mandatory fees (To learn more about these fees, go to ContosoEdAssistance, then review their Frequently Asked Questions (FAQ) Non-reimbursable tuition expenses include, but are not limited to: • Courses that assign Continuing Education Units (CEUs) rather than college-level credits • Courses that don't assign college-level credits • Courses that provide college-level credits through a transcript service • Testing fees (for example, the GRE, GMAT, or LSAT tests) • Room, board, transportation, and meals • Study guides and optional study aids • Application fees for installment loans, finance charges, late fees, or deferred payment fees • Seminars, workshops, continuing education credits, and certificates of completion • Certification, certificates, and licensing courses 7 • Non-graded courses including incompletes, for example, audit • Assessments • Thesis editing fee • Any other non-tuition expenses • Any other special and/or non-recurring fees • Non-mandatory fees (To learn more about these fees, go to ContosoEdAssistance, then review their Frequently Asked Questions (FAQ)

GET HELP IF YOU WANT TO:

Start by scheduling an advisory session Review program guidelines, request application approval, or submit a reimbursement request Get Help Learn about tuition discounts Find a regionally or nationally accredited institution recognized by the US Department of Education Learn how tuition assistance can affect an application for an EB-2 green card Learn more about Contoso’s Family Benefits by life stage GO HERE: ContosoEdAssistance, then click Schedule free education coaching or call (855) 500-8878 Monday – Friday, 5:00 AM-5:00 PM, Pacific Time ContosoEdAssistance Education Network or ContosoEdAssistance, then click View discounts from eligible schools The Database of Accredited Postsecondary Institutions and Programs Council of Higher Education Accreditation (CHEA) EB-2 Upgrade Eligibility Worksheet contoso.sites/FamilyBenefits/