Application for Education Assistance Instructions

Before the Course Begins – Requesting Approval

1. Read the Education Assistance Summary Plan Description posted on **CFTotalRewards.com**.

2. Complete this Application for Education Assistance.
   – This application is to be used for courses leading to a degree.

3. Submit the application to the following for approval:
   – Your immediate manager,
   – Your manager's manager, and
   – Your site Human Resources Representative.

   Move the application through the approval process. For example, after your manager and manager's manager approve the application, take it to your Human Resources Representative for approval.

4. Submit the Education Assistance application to the Benefits Department after obtaining all required approvals.

5. A new Application for Education Assistance must be completed for **each** course (or term, if multiple courses are taken in one term).

6. Applications must be fully approved <u>prior</u> to course start date to qualify for reimbursement.

7. Courses exceeding the $10,000 annual limit will be considered on an exception basis and will require review and approval by the Senior Leadership Team. Discuss your request for consideration with your Department Head. If your request is approved by your Department Head, your Department Head will be responsible for presenting your application to the Senior Leadership Team for consideration/approval.

After the Course Ends – Requesting Reimbursement

Submit your proof of course payment and final grades to the Benefits Department within 30 days of course completion.

All reimbursements will be made through payroll within two pay periods after the Benefits Department receives your reimbursement request.

APPLICATION FOR EDUCATION ASSISTANCE

To qualify for reimbursement, this application must be fully approved <u>prior</u> to the course start date.

Employee Information		School Information	
Name		School Name	
Job Title		Street Address	
Department		City	
Location		State/Province	

Course Information				
Course Name	**Begin Date**	**End Date**	**Tuition Amount**	The tuition amount must match the tuition amount on your documentation request for reimbursement.
		Total:		

Please attach a personal statement addressing why CF should provide assistance for you to receive your degree. Please be sure to include why you want to pursue the degree program at this time, how it will contribute to your current performance, and what impact it will have on your future career at CF.

Degree Program: Circle one: AA/AS   BA/BS   MA/MS   MBA   On-Line Course? Yes   No

Major: _____ **Expected Date of Graduation**: _____

    1. Are you eligible for Education Assistance from any other source? Circle one: Yes   No
       If yes, does that assistance need to be repaid? Circle one: Yes   No

    2. Have you been approved and/or received CF Education Assistance this calendar year?
       Circle one: Yes   No

The course(s) are considered to be directly related to the employee's work and/or probable future assignments and will be beneficial in the performance of his/her job.

Manager Approval: _____ **Date**: _____

Manager's Manager Approval: _____ **Date**: _____

Site Human Resources Approval: _____ **Date**: _____

I submit this application for benefits from the CF Education Assistance Program. I understand that I am eligible for reimbursement of Education Assistance benefits if I adhere to the program requirements, the date requirements, and obtain the appropriate signatures before the course start date.

I understand that if I voluntarily end employment with CF within 12 months of receiving an Education Assistance reimbursement, I will be required to repay the full amount (any education reimbursement received within the 12 months preceding my termination date) to CF within 30 days of my termination date.

Employee Signature: _____ **Date**: _____

For Benefits administrator use:

Year-to-date reimbursed	$
Year-to-date requested	$

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