



Education Assistance Reimbursement Request

Information about you:

Employee Last Name _____ Employee First Name _____ M.I. _____ Employee ID _____

Mailing Address _____ City _____ State _____ Zip _____

Email _____ Phone Number _____

Information about your Educational Institution:

Educational Institution Name _____ Employee Student ID _____

Educational Institution Address _____ City _____ State _____ Zip _____

Phone Number _____

This form must be completed and submitted within 90 days following your course, certification, or software program completion date along with all of the required documentation to Optum Financial formerly known as ConnectYourCare. You're required to submit this form along with proof of payment, proof of completion, and proof of purchase, if applicable.

All required documentation must be submitted with this form. Forms that are incomplete or missing required documentation will be denied. For complete submissions, Optum Financial will review and provide a response within 7-10 business days. If approved, payment will be made by Optum Financial to your bank account on file in their system, as soon as administratively possible. Please allow a minimum of 14 business days for processing.

For a list of eligible expenses, please see the Education Assistance Policy on mykcbenefits.com.

Date of Expense	Description of Expense	Amount
Total (not to exceed \$5,250)		\$

Have you received Education Assistance from K-C before? Yes No If yes, provide previous amount(s) and year received _____

I certify that the information provided on this form is correct and complete. I certify that the expense(s) for reimbursement requested from the Education Assistance Program were incurred by me and were for expenses aligned to my K-C career development. I certify that I've received team leader approval to receive reimbursement. In the event of a misuse and/or overpayment, I hereby agree to reimburse K-C for these amounts.

Benefits Team Use Only

ID# _____

Approval Date _____

Amount _____

Approved By _____

Employee Signature _____ Date _____

Team Leader's Signature _____ Date _____

K-C Education Assistance

You're eligible to receive education assistance if you're classified as a regular employee and you have eligible expenses related to education expenses incurred by you and used towards your K-C career development.

Reimbursement will not exceed \$5,250 per calendar year.

More details and applicable rules of this benefit are set forth in the Education Assistance Policy found on mykcbenefits.com.

Criteria for Eligibility

- You're a regular employee not classified as temporary, intermittent, intern, or co-op
 - You have team leader approval
 - Course or program is taken by you
 - Course or program begin date is on or after your hire date
 - Course or program is offered by an accredited institution, except in the case of software, certification, and pass/fail courses or programs
 - You provide proof of successful completion of a qualifying course (with a grade of C or higher), a completion certificate, or proof of "Pass" for a pass/fail course or program
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Eligible Expenses

- Tuition and other similar fees
- Assigned or recommended textbooks (e.g., workbooks, guides, etc.) or course-related software
- Registration and Administration fees
- Lab fees
- Expenses related to the cost of a certification program (i.e., CEBs, SHRM, trade/vocational, etc.) related to your K-C career development
- Expenses related to the cost of a pass/fail course (e.g., software, leadership, etc.) related to your K-C career development
- Professional exam review classes or examination fees

Ineligible Expenses

- Materials for classes (i.e., paper, pens/pencils, binders, notebooks, periodicals, newspapers, and standard reference materials such as dictionaries, encyclopedias, atlases, and reference tables)
 - On- or off-campus room and board
 - Supplies and equipment (including personal computers and calculators).
 - Meals, transportation costs, and parking fees
 - Conferences, even if a certificate is issued
 - Late fees and finance charges
 - Courses in sports and recreation, hobbies, games, physical development, health, religion, travel, and mental and spiritual renewal, unless a required part of an approved degree program
 - Courses which focus on self-understanding or awareness of feelings and stress management courses which focus on biofeedback, self-hypnosis, or relaxation techniques, unless a required part of an approved degree program
 - Expenses which are reimbursable from another source, such as scholarships, grants, government programs or other employer reimbursements for the same expense
 - Any other expenses not referenced above under "Eligible Expenses"
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Exclusions

- An individual not classified as defined above
- Expenses incurred prior to the effective date of this policy or to the eligibility date of the employee
- Expenses for a dependent
- Expenses that are not related to your K-C career development
- Expenses above the Internal Revenue Service annual limit of \$5,250 per calendar year