



APPLICATION FOR EDUCATIONAL ASSISTANCE - CGU

PART I: This section of the form must be completed by the employee and approvals must be obtained **before** commencing the course(s).

Employee Name

Date

Position

Years of Service

Department Name

Fiscal Year

Name of School/Institution

\$ _____
Cost of Tuition to be reimbursed
(33.3% of Tuition per fiscal year)

In order to qualify for Educational Assistance through Claremont Graduate University the course(s) must lead towards a degree or a professional development certificate program. Indicate the appropriate category below. For a Master's degree, the program must be directly related to the employee's current position with WesternU.:

The course(s) I am taking will lead towards a:

- ☐ Degree Program (Specify the degree): _____
- ☐ Certificate (Specify the certification): _____

Program Schedule:

Name of course(s) for the current fiscal year	Date Course Begins	Date Course Ends	Units/Credits
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Provide an explanation on how this program or this/these course(s) will assist you in the performance of your current position or prepare you for other positions within the University community.

I understand I must receive a grade of "C" or better or a passing grade in a Certificate Program for an undergraduate course in order to be reimbursed. I also understand I am responsible for furnishing proof of completion and original receipts in order to receive reimbursement for tuition. No expenses other than tuition are covered.

Important Tax Information: For determination of individual tax liability, the participant(s) in this program are encouraged to consult a qualified tax advisor, at the participant's expense, for applicability of Internal Revenue or State of California Tax Code.

Employee Signature

Date

PRE-APPROVALS:

Supervisor

Date

Dean/Department Head

Date

Executive Director, Human Resources

Date

To receive your Educational Assistance reimbursement, this form must be submitted to Human Resources **within sixty (60) days** of completion of the course(s), along with:

- the completed PART II: Request for Educational Assistance Reimbursement section below
- proof of grade of "C" or better, or passing grade received for the course, and
- original receipt(s) showing **you have paid the tuition** you are requesting reimbursement for (*your receipt(s) must clearly indicate the amount you paid is for tuition. No other expenses other than tuition are reimbursable*).

REQUEST FOR EDUCATIONAL ASSISTANCE REIMBURSEMENT

PART II: I have completed the following course(s) towards my degree/certification as described above.

_____	_____
_____	_____
_____	_____

Attached are:

- ☐ Proof of grade of "C" or better or a passing grade for the completed course(s).
- ☐ Original receipts for the tuition I paid for the completed course(s).

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For Office of Human Resources Only

Reimbursement: ☐ Approved ☐ Disapproved

Grade(s) Received: ☐ Yes ☐ No

Eligible Amount: \$ _____

Original Receipts received and verified by: _____
HR Representative

Date: _____

Finance review and approval by: _____

Date: _____