

Cal Poly Corporation Educational Reimbursement Program
Instructions and Application Agreement

This application is to be completed prior to the beginning of each educational term by a Cal Poly Corporation (CPC) benefited employee who is requesting reimbursement for matriculated course(s) taken at Cal Poly or any accredited higher education institution. Both the immediate supervisor and director must approve this application. The completed and signed form must be sent to the CPC Human Resources department for review and then will be submitted to the associate vice president of commercial services and executive director or his/her designate for approval.

Employee Information

Employee Name: Student ID#:

Department: Phone Ext:

Educational Institution: Term & Year:

Degree Pursuing: Undergraduate Graduate Other:

Course Information

Please list class(es) for current term.

Table with 5 columns: Rank, Class, Units, Days, Times. Rows 1, 2, 3.

Please explain how this course will enhance knowledge related to your position or career with CPC:

- Is this course part of a Career Development Plan?
Will this course be taken on your own time?
If no, has supervisor approved time away request?
Are you taking more than one class this term?

Signatures

Employee Signature

Date

Department Head (print)

Signature

Date

Supervisor (print)

Signature

Date

HR- Manager - Benefits & Employee Dev (print)

Signature

Date

Coursework for Matriculated Degree Program

Please complete the following if you are applying to the CPC Educational Reimbursement Program for the **first time** or if your degree/coursework changes. The employee will be required to re-apply to the program if they have not been enrolled in class(es) for more than two consecutive terms (excluding summer).

Employee Name: _____ Student ID#: _____

Department: _____ Phone Ext: _____

Educational Institution: _____ Term & Year: _____

Degree Pursuing*: _____ Undergraduate Graduate Other: _____

Please explain how the pursuit of the degree listed above relates to your current CPC position.

***Attach a print out of the degree requirements/curriculum (coursework list) and attach it to this application.**

Signatures for Approval

Employee Signature

Date

Department Head (print)

Signature

Date

Supervisor (print)

Signature

Date

HR Manager – Benefits & Employee Dev. (print)

Signature

Date

AVP of Commercial Services and Executive Director (print)
or Human Resources Director or Designate

Signature

Date

CPC Educational Reimbursement Program Eligibility and Statement of Responsibility

Eligibility

In order to participate in the Cal Poly Corporation (CPC) Educational Reimbursement Program, an employee must be a regular benefited employee in good standing and have been employed by CPC for a minimum of 12 months. Courses taken must be part of a matriculated program with an approved career development plan/degree goal which relates to the employee's current position at CPC. The maximum fee reimbursement per year (at Cal Poly or another college or university) equals the current resident (in-state) cost for "six or less" quarter units at Cal Poly for three quarters (fall, winter and spring). Costs vary depending on degree level. Books and materials are not eligible for reimbursement.

It is the employee's responsibility to pay for any fees beyond six units. The employee may be released during scheduled work hours for class time (at Cal Poly only) with supervisor approval depending on operational needs. Class time at Cal Poly consists of up to 4 hours per week per quarter. For purposes of overtime, time spent in class will not be considered hours worked unless attendance is required by CPC. Summer quarter at any institution is not reimbursable.

Statement of Responsibility

1. Employee is responsible for applying for admission at an approved, accredited institution.
2. Employee is responsible for registering and paying fees in accordance with Cal Poly or other accredited institution registration and fee schedules.
3. If applying for admission to Cal Poly or other accredited institution, the following fees are not reimbursable; any application fees, any admission fees, any fees beyond six units, and books and materials fees.
4. The employee is responsible for all registration fees up front which are associated with each term at Cal Poly or other accredited institution. The request for reimbursement must be submitted no later than 30 days after grades are published.
5. The employee must maintain a grade of "C" or better in all undergraduate classes and a "B" or better in all graduate classes in order to be eligible for reimbursement. A grade of C- or B-, respectively, or below is not reimbursable.
6. If educational assistance benefits received exceed the IRS allowable amount for the year, Cal Poly Corporation will include that excess amount as income. The excess amount will be taxable.

I have read and will comply with the requirements of the CPC Educational Reimbursement Program.

Employee (print)

Employee Signature

Date

Instructions for Enrollment at Cal Poly

If applying to Cal Poly for the **first time**:

1. Complete Cal Poly State University Application for admission online at www.csumentor.edu and pay the associated application and registration fees.
2. Complete the entire CPC Educational Reimbursement Application Agreement.
3. Submit the CPC Educational Reimbursement Application Agreement form to the CPC Human Resources office after your supervisor and department director have signed their approval.
4. Register via the internet www.my.calpoly.edu through CPReg during the specified registration period. Make sure all fees are paid according to the schedule.
5. Once grades are posted for the quarter, submit your receipt of registration payment along with your passing grade (must be a C or better for undergraduate and a B or better for graduate courses) to the CPC Human Resources office no later than 30 days after grades are published. Summer quarter classes are not reimbursable.

If you have **previously been enrolled** at Cal Poly:

1. If you are a returning Educational Reimbursement Program participant, and have not taken class for more than two consecutive terms, excluding summer, you will need to complete the Career Development Plan. □ You will also need to complete the Career Development Plan if you are switching majors.
2. Submit the CPC Educational Reimbursement Application Agreement form to the CPC Human Resources office after your supervisor and department director have signed their approval.
3. Register via the internet www.my.calpoly.edu through CPReg during the specified registration period. Make sure all fees are paid according to the schedule.
4. Once grades are posted for the quarter, submit your receipt of registration payment along with your passing grade (must be a C or better for undergraduate and a B or better for graduate courses) to the CPC Human Resources office no later than 30 days after grades are published. Summer quarter classes are not reimbursable.