



# VZ TAP Tuition Assistance Application

Phone / Fax 866-994-3470

If you have access to the Internet, do not complete this paper application. An online application is available at <http://tamsonline.org/vztap>. Follow the directions to send your application electronically. If you do not have access to the Internet, this paper application may be sent via US mail to: CAEL VZ TAP, PO Box 2824 Chicago, IL 60690-2824. Please do not send this application via company mail. Applications can be sent via email to [vztap@cael.org](mailto:vztap@cael.org) or faxed to 866-994-3470

**Complete ALL information. Your application WILL BE RETURNED if any information is missing. Allow two to three weeks to receive your Letter of Credit (Billing Authorization / Voucher)**

EMPLOYEE INFORMATION (Please print clearly with black ink or type)						
Name			Employee ID: BAID OR		Social Security Number	
Work Address			Rm/FI	City	State	Zip
Daytime Phone		Evening Phone		Fax	Email	
Department or Line of Business		Current Job Title		Have you been approved for Educational Leave of Absence for these classes? <input type="checkbox"/> Yes <input type="checkbox"/> No If "yes", attach official documentation. Start date:		
Employee Status: Check all that apply: <input type="checkbox"/> Full Time <input type="checkbox"/> Regular <input type="checkbox"/> Part Time <input type="checkbox"/> Temporary B <input type="checkbox"/> Term						
How would you like to receive your Letter of Credit? (Tuition Billing Authorization) Check one: <input type="checkbox"/> Email to address listed above <input type="checkbox"/> Mail to work address						
EDUCATIONAL INSTITUTION INFORMATION						
Name of School or Educational Institution				Contact Name (if available)		
City				State	Phone	
Program of Study/Major				Term	Year	Other financial aid? <input type="checkbox"/> Yes <input type="checkbox"/> No Source of aid
Check one: <input type="checkbox"/> Certificate <input type="checkbox"/> Associate <input type="checkbox"/> Bachelor <input type="checkbox"/> Master <input type="checkbox"/> EMBA <input type="checkbox"/> Doctoral <input type="checkbox"/> Course/Seminar <input type="checkbox"/> Other If enrolled in a degree/certificate program, is this program <b>required</b> by your employer to keep your present salary, status or job? <input type="checkbox"/> Yes <input type="checkbox"/> No If "yes" you may be asked to provide documentation. NOTE: Degree/certificate programs that are not <b>required</b> by Verizon to keep your present salary, status or job may be subject to federal tax.					If course (s) taught at Verizon site, provide address	

### Read this section carefully to determine the taxability of your annual tuition assistance benefits.

Section 127 of the IRS Tax Code requires that the employee pay taxes on employer-provided **non-job-related** tuition. All **non-job-related** Undergraduate and Graduate tuition in excess of \$5,250 annually is taxable. Therefore, if you are enrolled in a degree/certificate program **required** by your employer for your current job, all courses related to the program are non-taxable. Additionally, if an individual course is **required** by your employer for your current job, or if it maintains or improves skills needed in your present work, the course is non-taxable.

Employees may want to check with their supervisor, the CAEL office or the TAP Manager if they have questions about the job relatedness of a course or degree program. Additionally, all employees are encouraged to check with a tax advisor or financial planner if they have concerns about the tax liability that may be incurred for tuition assistance payments.

COURSE INFORMATION						
Specific Course Title	Course No.	Credits	Course Start Date	Course End Date	Tuition \$	Fees \$
Is course <b>job-required</b> or does it maintain or improve skills in current job? <input type="checkbox"/> Yes <input type="checkbox"/> No						
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Is course <b>job-required</b> or does it maintain or improve skills in current job? <input type="checkbox"/> Yes <input type="checkbox"/> No						
Specific Course Title	Course No.	Credits	Course Start Date	Course End Date	Tuition \$	Fees \$
Is course <b>job-required</b> or does it maintain or improve skills in current job? <input type="checkbox"/> Yes <input type="checkbox"/> No						

EMPLOYEE AUTHORIZATION	
<p>I wish to enroll in the above course(s) / program(s). I agree to pay any late payment or additional fees which the school imposes if my application is not submitted in a timely manner. I understand that my tuition assistance may be subject to income taxes as well as annual maximums for approvable tuition and fees. I have read the policies and procedures of Verizon and agree to abide by them. I understand that, if my enrollment in the course(s) at the above institution is approved, the Company will pay tuition and approvable fees directly to the foregoing institution subject to the limits and conditions in the Plan. I further understand that my Letter of Credit for prepaid tuition can only be used for services, courses, fees, expenses and programs approvable under the terms of the Plan. I also understand that I must mail my official grade report within sixty (60) calendar days of course completion to the VZ TAP Plan Administrator. I understand that failing to submit my grade within sixty (60) calendar days of course completion will result in a notice that tuition must be repaid within 90 days. If repayment is not made within 90 days of the notice, my account will be referred to an external collection agency and I will be subject to discipline up to and including dismissal. I understand that I must complete each course, earning credit in a credit course, "pass" in a pass/fail course, or a certificate in a certificate course. If I do not pass the course, I understand that I must repay the Company the amount paid or owed to the institution by the Company on my behalf. I also understand that, if I withdraw from a course or if I voluntarily terminate employment with the Company, I must notify the VZ TAP Plan Administrator and that I am responsible for repaying the Company the amount paid or owed to the institution on my behalf. Such repayment must be made in full within ninety (90) days of notification by the Plan Administrator. I understand that if I fail to repay the company within ninety (90) days of notification by the Plan Administrator my account will be referred to an external collection agency and that I will be subject to discipline up to and including dismissal. Failure to remain in compliance with the Plan will also make me ineligible to participate in the Plan. My school/educational institution is authorized to give course, credit and financial information to the VZ TAP Plan Administrator. I further understand that Company specifications, practices, design, apparatus or materials are not to be used in any of my courses unless, in each instance, I receive written authorization from my supervisor. I am aware that courses are to be taken on my own time and that VZ TAP cannot be used to pay for course work taken on Company time. <b>Additionally, I understand I cannot accept any incentives, compensation, goods, services, gifts or anything of value (including but not limited to computers, cash, gift certificates, PDAs) for taking or completing a course that is paid for by the Company. The sole exception is printed or electronic instructional materials. If I violate this prohibition, I will be subject to discipline up to and including dismissal and will be required to repay the entire tuition amount.</b></p>	
Employee Signature:	Date: