

UPDATED NEW ELIGIBILITY RULES FOR REGION 9A ED FUND REIMBURSEMENTS

Members in UAW Region 9A may apply for and may be eligible for reimbursement of payments for education subject to the following guidelines and restrictions:

The member must be in a participating local and employed by a participating employer.

The member must not be on probation and must not have been on probation during half or more of the course of study for which reimbursement is sought.

The expenses for which reimbursement is sought must be payments for actual instruction (whether in person or online, but involving an instructor in real time), and not incidental costs such as books, other course materials, lodging, or transportation.

The instruction for which reimbursement is sought must be primarily and most directly (as determined in the discretion of the program Director, appealable in writing to the Trustees) for the sake of developing knowledge and/or skills, rather than, for example, for entertainment or health and wellness. To illustrate the distinctions, classes for the acquisition of utilitarian skills, such as driving or swimming instruction, would qualify. A literature or history class would also qualify, notwithstanding that entertainment was the goal and end result of acquiring the knowledge in question. The services of a personal athletic trainer would not qualify. Training to be certified as a yoga instructor would qualify, while yoga classes primarily for the sake of staying fit would not qualify, notwithstanding the necessary acquisition of some knowledge of yoga positions.

The instruction for which reimbursement is sought must have been actually and successfully attended. This may be evidenced by a signed certificate of completion, a transcript from the provider indicating a passing grade, or a signed letter on letterhead attesting to the member's attendance and successful completion of instruction sessions. A traditional course of instruction with a final examination would qualify. However, attendance at one or more sessions of instruction, whether group or individual, with a satisfactory level of acquisition of the subject skills and/or knowledge as attested by the instructor would also qualify. Classes for which the member paid but which the member did not attend and/or from which the member did not acquire skills or knowledge to the satisfaction of the instructor would not qualify.

The reimbursement sought must not be for an expense otherwise reimbursable by the employer, e.g. continuing legal education (CLE) or other professional training.

The reimbursement sought must be for an amount which the applicant actually paid for the instruction, as evidenced by a signed acknowledgment of receipt of the full amount. Signed documentation of payment may be in the form of a traditional receipt, or the inclusion of the payment information in a letter on letterhead, or a copy of a canceled check.

Reimbursement may be for more than one course of instruction in a calendar year but is limited to a maximum total of one thousand dollars (\$1,000) per applicant per calendar year.

The cost of a course or portion of a course may be reimbursed only if it occurred during the calendar year in which application for reimbursement was made or during the preceding calendar year. Nothing prior to the beginning of the previous calendar year shall be reimbursable.