



UAW-GM Tuition Assistance Plan Guidelines



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UAW-GM Tuition Assistance Plan for Active Employees (ATAP)

Eligibility

An active employee is defined as a UAW-represented GM U.S. employee with 90 days seniority on the active employment roll or on a temporary layoff and/or full-time temporary employees with at least 90 days of continuous service. The following ATAP eligible employees are those who are:

- On Active Employment Rolls
- On Temporary Layoff
- On Leave of Absence under provisions of Paragraph (109) and (109)(a)
- In-Progression Employees
- On Military Leave of Absence
- On Education Leave of Absence

Employees on a Medical Leave of Absence at the start of a course are not eligible for TAP benefits until they return to work. Employees who accept a voluntary termination of employment, i.e. buyout, are not eligible for tuition assistance.

Military Leave of Absence

Active employees on a Military Leave of Absence under the provisions of Paragraph (112) are eligible for active TAP benefits. These employees must first exhaust all military tuition assistance prior to utilizing UAW-GM TAP.

Education Leave of Absence

Active employees on an Educational Leave of Absence under the provisions of Paragraph (113) must be pursuing a four-year degree or graduate degree to be eligible for active TAP benefits. TAP Applications for employees on Education Leave of Absence will be processed under the guidelines of Active TAP.

In Progression Employees

In-Progression employees, as defined by the Memorandum of Understanding In-Progression Wage and Benefit Agreement, are eligible for Active TAP benefits.

Benefit Levels

Active Tuition Assistance benefit levels established by the 2023 UAW-GM National Agreement are:

- \$8,000 per calendar year for courses at regionally accredited colleges or universities

Regional accreditation is a status granted to colleges and universities found to either meet or exceed academic quality standards established by an accrediting agency through an assessment process. This type of designation indicates academic quality for educational institutions, with emphasis focused on academic core values of performance, integrity, and quality assurance. Schools that have achieved this type of accreditation assure that the educational institution satisfied quality standards established by experts.

- \$4,000 per calendar year for job related courses
- \$1,500 per calendar year for personal enhancement courses not related to the employee's current job assignment, excluding courses commonly considered sports, games, and hobbies

Advance Payment

Active employees enrolled in an accredited college degree program, who exhaust their current calendar year tuition eligibility, may utilize up to \$1,000 of the following year's eligibility to cover the present or next semester's eligible expenses. This advance payment is provided only in conjunction with courses offered at regionally accredited colleges or universities on a semester or quarterly basis. Advance payments are not available for job related or personal enhancement courses.

***Please note:** Advance payment is not available in the last calendar year of the current National Agreement and does not increase the total tuition assistance benefit over the life of the 2023 National Agreement.*

In no event shall the total assistance exceed \$9,000 (which includes the \$1,000 advance payment) in a twelve-month period. Period is defined as a calendar year, January 1 thru December 31.

Imputed income is the value of a service or benefit provided by employers to employees, which must be treated as income. For tuition assistance, only the first \$5,250 can be provided as tax exempt to employees. After that dollar amount is reached for the tax year, any additional funds received will be imputed for Federal, State, Social Security and Medicare taxes as applicable.

UAW-GM Tuition Assistance Plan Application Process

Student Instructions: The UAW-GM TAP application for Employees should be completed by the course start date, but no more than ninety (90) days, prior to the start of class(es). TAP is designed to be a prepaid program.

Select your field of study and educational institution carefully. Identify and visit various educational providers that offer the course(s)/program in which you have interest. Make your selection based on the following:

- the education provider's accreditation or license
- the quality of instructors and equipment
- the tuition cost
- the skills obtained from the course(s)/program

Do not sign enrollment agreements with educational providers or start class until you have received TAP approval. If you are not approved by TAP, you will be liable for all of the tuition charges.

TAP applications are created and submitted online via the EdAssist website at <https://uawgm.edassist.com>. Click "New Application" and follow the 5-step process below to submit an application:

1. Enter your contact information.
2. Enter your program information.
 - a. Follow the on-screen instructions, to make sure you select the appropriate system program from the list.
 - b. You will also be prompted to select your "Education Program" (degree level or individual course) and "Field of Study" (major). If you do not see your expected choices, you may have selected the wrong system program in Step 1.
 - c. Lastly, you must enter your school. If you select a school without the proper accreditation, you will be warned by the system. Submitting an application with a non-accredited school will result in a denial.
3. Enter your session information and expenses.
 - a. Enter your term start and end dates, in the appropriate fields.
 - b. Enter your course information and tuition amount.
 - c. Click "Add Course."
 - d. If you have Course-related expenses, click "Yes," select "Expense Type," and enter the "Amount."
 - e. Continue.
4. Indicate whether you receive any grants, scholarships, or discounts. Read all agreements carefully, accept, and enter your electronic signature.

Please note: With your electronic signature, you acknowledge and agree that improper or unauthorized usage of the program including, but not limited to, falsification of information or records may result in disciplinary action, up to and including discharge.

5. Review all of the application details. If everything is correct, submit.

If you are unable to finish the submission process in one session, you can always go back to the Home page or log out. Your in-progress application will have the status “Saved – Not Submitted” and can be restarted next time you log into the site.

Upon application approval by the system, you will receive a Voucher/Letter of Credit to present to your school at the time of course registration. The school will submit an itemized invoice of tuition and fees to EdAssist. EdAssist will process payment to the educational provider for eligible tuition and fees on behalf of UAW-GM. You are responsible for submitting proof of successful course completion (grades) within 60 days after course completion to close out the application.

School Instructions for Payment:

Enroll the student listed on the TAP “*Employee Tuition Assistance Plan Voucher/LOC*” in the course(s)/program indicated. The employee’s signature is required for payment. If the student is enrolled in a degree-related course(s) and a course(s) specified on the certificate is unavailable, class is filled or cancelled, the student, with the assistance of a school counselor or school official, may select an equivalent course to satisfy his/her educational goals. However, the student cannot enroll in the equivalent course if that course was previously approved and funded by TAP in a prior term.

Please note: *The TAP “Employee Tuition Assistance Plan Voucher/LOC” expires on the grade and receipt submission deadline (60 days after the course end date).*

Invoices must be submitted on an individual basis with the following information listed:

- Student name and student number
- All course(s) billed
- Breakdown of total tuition cost and specific fees billed
- Beginning term/phase start date
- Copy of the signed TAP “Official Approval Certificate”

Invoice EdAssist by sending an email to edprovider@edassist.com. To avoid processing delays, please be sure to include the application number found on the Voucher. Be sure to also include the following on the invoice: student name and ID, course name, client name (UAW-GM) and an itemized breakdown of tuition, as well as any gift aid applied (stipends, grants, scholarships), and separate fees associated with this course. The EdAssist Employee Services team reconciles the invoice to the original submission. The school is provided with payment for eligible tuition and related expenses via check mailed bi-weekly. Any amounts not covered by UAW-GM are the responsibility of the employee.

If there is any reason to refund tuition or compulsory fees paid as part of this Plan, the refund must be sent directly to EdAssist, not the participant, ATTN:

**EdAssist
32879 Collection Center Drive
Chicago, IL 60693-0328**

The UAW-GM TAP Administration reserves the right to approve, audit, review and/or revoke continued participation/eligibility of the education provider and/or the employee under the provisions of the TAP. Upon acceptance of the TAP “*Employee Tuition Assistance Plan Voucher/LOC*,” the educational provider agrees to abide by the principles required by UAW-GM TAP.

UAW-GM Tuition Assistance Plan Course Guidelines

Approvable TAP courses are those required for adult basic education, high school completion or high school equivalency, university, college, business, trade or vocational school courses or adult education classes. **All classes related to sports, games, and hobbies are not TAP eligible.**

Job Related Courses

Job Related courses are classes that are designed to maintain and or improve an employee's skills and knowledge in applicable work-related subject matter. The educational focus should be on courses that help improve an employee's skill in the work place.

Personal Enhancement Courses

Courses must be taken at acceptable schools including those accredited by recognized accreditation agencies, those approved by government education or training programs, or other jointly approved schools.

Approved vs. Not Approved Courses

Course eligibility guidelines are as follows:

- Approved Courses are courses that:
 - Must be offered to the general public with published tuition cost and fees
 - Are college or university courses generally covered in an accredited degree program
 - Are approved Adult Education, business, trade, vocational or technical school courses which are reviewed by the TAP Administrators for eligibility
 - Lead to a GED or High School Completion, if not provided free of charge by the state in which the employee lives or attends school
 - Are basic skill courses
- Not Approved Courses are:
 - Sports, games, and hobbies
 - Courses related to job specific training
- Lecture, seminars, or workshops are not approved *if*:
 - Taken during regular scheduled work hours
 - The course, content, length, or cost are determined ineligible by the TAP Administrators
 - The cost of materials and/or meals is not itemized
 - Completion verification is not issued
 - There is no refund policy
 - The approved institution is not the actual sponsor

Onsite classes are not available under the revised program guidelines.

UAW-GM Tuition Assistance Plan Book Reimbursement

Book Reimbursement

Reimbursement for books is available to active employees for degree-related courses. The book reimbursement amount and tuition cannot exceed the yearly \$8,000 allotted Active TAP payment.

To receive reimbursement, a Book Reimbursement application should only be completed if the active employee prepaid book fees for a TAP approved degree-related course(s). TAP requires satisfactory completion verification prior to reimbursement. The following is required to obtain direct reimbursement from TAP:

Book reimbursement applications are created and submitted online via the EdAssist website at <https://uawgm.edassist.com>.

When an employee is eligible to request reimbursement for book expenses (once the course ends), they will receive a system-generated email with information about how to create an application. The “Other Expense” application button will appear on the Application Summary page.

Once eligible, employees have the ability to create and submit a one-page “Other Expense” application.

Additionally, the book syllabus for the course(s) must be uploaded with any receipts. Only the book(s) on the required or optional list will be reimbursed.

UAW-GM Tuition Assistance Plan School Eligibility Guidelines

The schools must be accredited by a U.S. nationally or regionally recognized accrediting agency such as: American Council on Accreditation or a government approved license by the state board of education. Accreditation is mandatory for degree granting institutions.

Educational Provider Eligibility Guidelines

All educational providers must adhere to the following eligibility guidelines:

- An educational provider must not allow an employee to start class(s) without a TAP “*Employee Tuition Assistance Plan Voucher/LOC*”
- The institution must be in operation for at least two (2) years and must have a brick and mortar location
- There must be an existing refund policy

The UAW-GM TAP Administration reserves the right to approve, audit, review and/or revoke continued participation or eligibility of an educational provider under the provisions of the UAW-GM TAP. Upon acceptance of the TAP “*Employee Tuition Assistance Plan Voucher/LOC*,” the educational provider must agree to abide by the policies and procedures for educational providers and its principles and processes required by the UAW-GM TAP.

The UAW-GM TAP does not allow educational providers to advertise any materials or programs as UAW, GM, UAW-GM or TAP approved.

Fees

TAP benefits include payment of certain compulsory fees mandated by the employee’s educational institution. The following examples are appropriate and inappropriate reimbursable fees. Duplication of tuition or fees already covered by state or federal education assistance plans or programs are prohibited.

Appropriate covered expenses:

- Tuition or General Fees
- Registration Fees
- Laboratory and Mandatory Service Fees
- Book fees for degree-related courses (out of the yearly allotted active TAP benefit amount).

Inappropriate covered expenses:

- Supplies, Equipment, Products, or Materials
- Late registration or Add/Drop Fees
- Transportation or Parking Fees
- Student ID Fees
- Meals or Recreational Activities
- One-time or Non-mandatory Fees, i.e. application fees
- Test or Examination Fees
- Graduation or other expenses

UAW-GM Tuition Assistance Plan for Laid Off Workers (ITAP)

Eligibility

To be eligible for inactive tuition assistance (ITAP) an employee must:

- Be a UAW-represented GM U.S. employee
- Be on indefinite layoff
- Have a minimum of one-year seniority as of the day of layoff
- Have recall/rehire rights under the terms of the 2019 National Agreement

In the event a laid off employee returns to active status, the employee will become eligible for TAP under the provisions of the Active TAP plan. ITAP benefits paid during the current calendar year will be considered when determining eligibility for an active employee. Employees on temporary layoff are processed under the Active TAP provisions.

Employees are not eligible for ITAP if their employment status changes, or if they:

- Lose their seniority rights
- Lose their rehire rights
- Get hired by another employer for full-time work at comparable wages
- Qualify for similar training programs with a new employer
- Get recalled to work by General Motors. If the employee is enrolled in class(s) at the time of recall, then the employee is allowed to complete the class(s), as long as attendance does not conflict with employment.
- Accept a voluntary termination of employment (buy out)

Benefit Levels

The maximum TAP benefit payable while on indefinite layoff is \$8,400. ITAP benefits are determined by seniority as of the last day worked prior to layoff. ITAP benefit levels are:

- \$7,400 1 to 3 years seniority
- \$8,400 3 to 4 years seniority
- \$9,400 4 or more years seniority

In no event shall the total assistance to an inactive employee exceed \$9,400 in any four calendar year periods.