



**UAW/Rolls-Royce  
Tuition Assistance Program (TAP) Application**

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APPLICATION #

Name \_\_\_\_\_ Last First Middle Badge # \_\_\_\_\_ Cell Phone \_\_\_\_\_  
 Active  LOA  Retired  Days  Afternoon  Midnight Email \_\_\_\_\_

**Fitness or Financial Wellbeing Reimbursement \$1450** (see Guidelines on page 2)

<u>Description</u>	<u>Cost</u>	<u>Purchased for?</u> (see Eligibility on page 2)
M: _____	\$ _____	
T: _____	\$ _____	
L, S, F: _____	\$ _____	

Registered Business \_\_\_\_\_ **TOTAL COST** \$

Provider must be a registered business to receive reimbursement for Fitness and Financial Wellbeing.

**Tuition Assistance for Active Employees Only**

Job Related \$2100  Regional Accredited (RA) College or University \$5200 (see Guidelines on page 2)

Educational Provider \_\_\_\_\_ Student ID \_\_\_\_\_  
Eligibility: Provider must be a pre-approved vendor for Job Related and Regionally Accredited payment/reimbursement.  
 Phone & Contact: \_\_\_\_\_ Website: \_\_\_\_\_ Term: \_\_\_\_\_

Is this institution accredited/licensed?  Yes, by what agency? \_\_\_\_\_  No

Course Code & Title	Course Hours	Tuition Cost	RA Compulsory Fees	RA Books	Fee Name
_____	_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	\$ _____	\$ _____	\$ _____	_____
_____	_____	\$ _____	\$ _____	\$ _____	_____

Will you receive financial aid or benefits from other sources (such as VA, scholarship or grant)?  Yes  No  
RA College/University Only: \$100 max book allotment, per course. \$1000 may be borrowed from upcoming year's allotment, except in a contract year. No more than \$6200 Total TAP Funds may be spent, per calendar year. **TOTAL COST** \$

As an eligible UAW represented employee of Rolls-Royce, I am applying for approval of the above course(s) under the UAW Tuition Assistance Program (TAP.) I understand that; (1) the UAW-TAP administration reserves the right to approve, review, or discontinue participation/eligibility of an educational provider; (2) tuition assistance, fitness, and financial wellbeing is subject to conditions contained in the 2020 National and Local Agreement between Rolls-Royce Corporation and the UAW; (3) I am responsible for the payment of all non-approved costs and/or fees; (4) classes must be attended on my own time. In addition, I agree to provide all information requested by the UAW-TAP administration to continue to meet the provisions required. I further authorize any educational institution that I may attend to release to the UAW-TAP administration any requested information pertinent to this program. I understand that the Federal tax law may require Rolls-Royce to withhold applicable federal, state and local taxes (Fitness and/or wellbeing subsidy may be considered a taxable benefit under IRS Regulation 1.61-1.) See your tax advisor for details. In addition, for fitness and financial wellness reimbursements: I understand that fitness and financial wellbeing reimbursements will be made no more than once per quarter, payable through employee direct deposit, upon receipt of proof of a qualified expense. By submitting this form, I am attesting that the reimbursement/payment I am claiming is for me or a covered dependent under the terms of my health care plan.

**Applicant's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

By typing my name or signing I agree to the above terms.

Cannot exceed maximum \$6200 per calendar year, combined reimbursement and direct payment, includes Fitness and Financial Wellbeing, Job Related, and Regionally Accredited (RA) tuition.

Note: includes book allotment and \$1000 borrowed monies for RA

**Fitness & Financial paperwork is due by December 15<sup>th</sup> to ensure reimbursements are processed timely.**

UAW Tuition Assistance Program  
 Call, text, email, or visit:  
**765-810-6266 or email [ROBERT.HALLJR@ROLLS-ROYCE.COM](mailto:ROBERT.HALLJR@ROLLS-ROYCE.COM)**  
**317-590-9581 or email [LENA.L.WISE@ROLLS-ROYCE.COM](mailto:LENA.L.WISE@ROLLS-ROYCE.COM)**  
 Fax 317-230-6226  
 Plant location:  
 UAW/RR Training Center Room C102, next to UAW sign.

## APPLICATION PROCEDURE:

### **Fitness & Financial Reimbursement Guidelines:**

As part of our commitment to employee wellness, per the 2020 National Agreement between Rolls-Royce and the UAW, we are offering a fitness and financial wellbeing subsidy to UAW represented Rolls-Royce employees, retirees, and their covered dependents.

- **Employee Eligibility:** Includes Active Employees, LOA (receiving benefits), Retired Employees and their Covered Dependents (on insurance), and dependents who qualify for benefits. Must be married for significant other to receive TAP benefit. Retiree spouse eligibility restrictions may apply.
- **Business Eligibility:** Must be registered business, includes government and township entities. Restrictions may apply. Contact TAP representative for more information.
- **Amount of Fitness & Financial Wellbeing Reimbursement:** \$1450 maximum per calendar, total for employee and/or their covered dependents.

### **Application Process:**

1. Please complete this form and include Registered Business information.
2. Include receipt, proof of payment, and other document that verifies participation in a qualifying fitness or financial activity. This Application authorizes the UAW-TAP program to approve the amount indicated above, up to the maximum allotment of \$1450 per calendar year.
3. Enter **self** and/or **covered dependent's name** on **Purchased For?** line.
4. Email, text, fax, or drop off to UAW-TAP for approval and reimbursement processing.
5. **Reimbursements will be made no more than once per quarter, annual reimbursement is preferred, through direct deposit.**

### **Covered by Fitness & Financial: (examples, but not limited to)**

- Sports Leagues & Camps: golf, archery, basketball, baseball, softball, marching band, gymnastics, dance, swimming
- Health & Activity Tracker: smart watches (Apple, Samsung, Fitbit, Garmin), blood pressure monitor, smart scale, oxygen monitor, EKG Kardiamobile tracker (see TAP)
- Fitness Subscriptions and Videos: Weight Watchers, Noom, Loselt, National & State Annual Park Passes, iFit, BeachBodyonDemand
- Fitness Membership, Classes, and Wellbeing: gym membership: YMCA, LA Fitness, Township Req Centers, Exercise Inc., Crossfit, Orange Theory, Hancock Wellness, Planet Fitness, etc., personal trainer: weight, nutrition, strength & agility, yoga, martial arts, swimming (and lessons), scuba, dance lessons, ski/snowboarding lessons, Pilates, meditation, weight loss
- Financial Planning and Classes: newsletter, wills and trusts, retirement planning
- Discounts: YMCA: Indy 10% or Martinsville 15% (ID badge or letter required), ANTHEM.COM: Fitbit & Garmin

### **Not covered under Fitness & Financial: (examples, but not limited to)**

- Club memberships: golf clubs, country clubs, social clubs, etc.
- Fitness equipment: treadmills, free weights, sneakers, golf clubs, etc.
- Financial investment fee, magazines, etc.
- Golf lessons, leagues (bowling, dart & pool), AED device, diabetic monitoring, meals or supplements, services covered by insurance

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### **Job Related Guidelines:**

- **Employee Eligibility:** Active Employees Only (not on LOA)
- **Educational Provider Eligibility:** Must on pre-approved vendor list; contact UAW-TAP for more info.
- **Amount for Job Related:** \$2100 maximum, per calendar year.

### **Regionally Accredited (RA) Guidelines:**

- **Employee Eligibility:** Active Employees Only (not on LOA)
- **Educational Provider Eligibility:** Must be Regionally Accredited; contact UAW-TAP for more info.
- **Amount for Regionally Accredited (RA) Colleges & Universities:** \$5200 maximum, per calendar year. Includes \$100 per book, per course. You may borrow \$1000 maximum from upcoming year's tuition allotment, except in last year of current contract.

### **Application Process for Job Related and Regionally Accredited Courses:**

1. Please complete this section to the best of your ability; your educational institution or TAP representative is available to help.
2. Course code, tuition cost, and compulsory fees are mandatory to process RA approval.
3. This Application authorizes the UAW-TAP program to approve the amount indicated above, up to the maximum allotment per calendar year. You are responsible for any tuition cost and/or fees over this amount.
4. If for any reason, the course you planned to enroll in is not available (class is filled or canceled) see a school counselor if you wish to select an equivalent course to satisfy your educational goals.
5. All course changes should be sent to the UAW-TAP office on a new application; an updated approval will be sent directly to the educational institution.
6. If you decide not to attend or need to withdraw: 1. Contact your Educational Institution, at your earliest convenience, as there may be a fee(s) to withdraw. 2. Notify the UAW-TAP program to ensure fees are paid correctly.
7. **In case of refund: Should the educational provider inadvertently send refunded monies directly to you, contact the UAW-TAP office immediately. Your future eligibility may be negated if monies are not returned.**
8. Your **official** grade report, transcript, or completion certificate should be sent to the UAW-TAP program within 45 days of the term ending date.