



# Educational Assistance Request Form

(ONE Class per Form)

For McOpCo restaurant Crew, Floor Supervisors, Shift Manager Trainees, Primary Maintenance, and all other part-time employees use

- Include an itemized Tuition Statement(s), Book Receipt(s) and eligible Supplies Receipt(s)
- Assistance will only be paid once we receive all required receipts and form is signed by Employee and Manager
- In order to be reimbursed in the current calendar year all required receipts and forms must be submitted by **December 5, 2017**.

<b>Employee Information</b>	LAST	FIRST	MIDDLE	EMPLOYEE #:
	NAME:			*YOUR EMPLOYEE # CAN BE FOUND ON THE TOP RIGHT CORNER OF YOUR PAY STUB*
	STREET:		CITY:	
	EMAIL ADDRESS:			
<b>School and Course Information</b>	STATE:	ZIP CODE:	TELEPHONE #: (     )     -	
	NAME OF ACCREDITED INSTITUTION:			
	CITY:	STATE:	ZIP:	COUNTRY:
	COURSE NAME: _____			
	DATE COURSE STARTS: ____/____/____		DATE COURSE ENDS: ____/____/____	
	ARE YOU PURSUING A DEGREE? <input type="checkbox"/> YES <input type="checkbox"/> NO			
	IF YES, WHAT TYPE OF DEGREE? <input type="checkbox"/> HIGH SCHOOL <input type="checkbox"/> ASSOCIATES <input type="checkbox"/> UNDERGRADUATE <input type="checkbox"/> GRADUATE			
	FIELD OF STUDY: _____			
	TUITION COST: \$ _____			
	YEAR IN COLLEGE: <input type="checkbox"/> FRESHMAN <input type="checkbox"/> SOPHOMORE <input type="checkbox"/> JUNIOR <input type="checkbox"/> SENIOR <input type="checkbox"/> GRADUATE STUDENT <input type="checkbox"/> N/A			
HOW MANY COLLEGE COURSES ARE YOU TAKING THIS TERM? _____				
<b>Grants &amp; Scholarships</b>	ARE YOU RECEIVING EDUCATIONAL GRANTS OR SCHOLARSHIPS? <input type="checkbox"/> YES <input type="checkbox"/> NO			
	IF YES, LIST AMOUNT \$ <b>CIRCLE ONE:</b> PER SEMESTER / QUARTERLY / YEARLY			
<b>Signature</b>	<ul style="list-style-type: none"> <li>• I understand that I must provide McDonald's, <b>within 3 months of course end date</b>, a request form, tuition statement (including course name and fee detail), book receipts and other course-related receipts.</li> <li>• I understand that if I do not turn in my grade, required request form, tuition statement, book receipts or other course-related receipts, within 3 months of course end date; the amount already paid to me will be deducted from the remaining annual allowance.</li> <li>• I understand that if I drop the course or fail to complete the course with a grade of "D" or better, the amount already paid to me will be deducted from the remaining annual allowance.</li> <li>• I understand that Grants &amp; Scholarships are not included when calculating my reimbursement. Educational assistance is limited to the difference between the amount of student aid and the cost of the course.</li> </ul>			
	EMPLOYEE SIGNATURE:			DATE:
<b>Approvals</b> I certify this employee is in good standing & that I understand the attached instructions	MANAGER SIGNATURE:			DATE:

Please forward this completed form and all required attachments (if applicable) to:

McDonald's Service Center Dept. 28, McDonald's Corporation, 2111 McDonald's Drive, Oak Brook, IL, 60523

Telephone #: (877) 623-1955 (Option 3 Benefits) Fax #: (630) 623-5027 E-mail address: [mc.service\\_center@us.mcd.com](mailto:mc.service_center@us.mcd.com)

To confirm receipt of your documents please contact the Service Center. Representatives are available M – F 8:00am – 5:00pm CT, excluding holidays.



# Educational Assistance Instructions

For McOpCo restaurant Crew, Floor Supervisors, Shift Manager Trainees, Primary Maintenance, and all other part-time employees use

## Manager

**Note: It is the responsibility of the Manager to ensure that the employee meets all the eligibility requirements that are listed below.**

### Eligibility

Employees are eligible to be reimbursed under the Archways Educational Assistance Program if they:

**Are McDonald's Corporate restaurant Crew, Floor Supervisors, Shift Manager Trainees, Primary Maintenance, and all other part-time employees use**

- Have been employed with a McDonald's Corporate restaurant for at least 9 cumulative months. (*Approved leaves of absence are not considered a break-in-service*),
- Are working an average of 20 hours/week,
- Have a performance rating of "significant performance" or "good" and maintain this rating throughout the course.

### Course Criteria

To apply for educational assistance, an employee first must obtain approval from their Manager before registering for any course.

Courses that are seminar classes offered by professional associations and societies are **not** eligible for reimbursement under this program. They may be eligible under your department or region's Management Development budget. Contact your department head if a course does not meet the criteria under this Educational Assistance Program.

Actual exam costs are not eligible for reimbursement under the program.

All requests for Educational Assistance Reimbursement must be submitted within 3 months of the class end date to qualify for Educational Assistance.

### Where Course is Taken

To qualify for Educational Assistance reimbursement, all courses must be taken at an "approved school" such as a two or four year public or private college or university; business, technical or vocational school; graduate or post -graduate school that is accredited by the Department of Education.

### Eligible Charges

Reimbursement for each course will be 100% of eligible expenses (which includes tuition, registration, university and lab fees, books and certain supplies) with a maximum of \$700 paid per calendar year for all courses.

If an employee is eligible for financial assistance under any other federal or state educational program or any other financial aid program, reimbursement is limited to the difference between the amount of student aid they receive and the cost of the course.

## Employee

### Course costs will be reimbursed as follows:

All requests for Educational Assistance must be submitted within 3 months of the class end date to qualify for Educational Assistance.

- 100% will be paid upon submission of the completed approval form (with necessary approval), and copies of the receipts (retain the originals for your records).
- If the employee drops the class, receives a grade below "D" or the appropriate paperwork is not submitted with 3 months of the class end date, the employee's annual allowance will be reduced by the previously reimbursed amount.
- Reimbursement will be included in the employee's regular paycheck, as soon as administratively possible once all appropriate documents are received.

**McDonald's reserves the right at its sole discretion to amend this program at any time without prior notice. This program does not establish contract rights or constitute rights to future employment.**

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