



# Educational Assistance Request Form

(ONE Class per Form)

For McOpCo Certified Swing, General Manager, Restaurant Manager Employee & Store Manager Trainee Use

- Include all relevant Tuition Statement(s), Book Receipt(s) and eligible Supplies Receipt(s).
- Reimbursement will only be paid once we receive all required forms, receipts and required signatures.
- 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*
	EMAIL ADDRESS:			
	STREET:		CITY:	
STATE:	ZIP CODE:		TELEPHONE #: (    )    -	
<b>School and Course Information</b>	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"/> ASSOCIATES <input type="checkbox"/> UNDERGRADUATE <input type="checkbox"/> GRADUATE			
	FIELD OF STUDY: _____			
	TUITION COST: \$ _____			
	BOOK COST: \$ _____			
	SUPPLIES: \$ _____			
TOTAL 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 &amp; Approvals</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 in order to receive the 100% reimbursement.</li> <li>• I understand that if I do not turn in my grade within 3 months of course end date, drop the course, or fail to complete the course with a grade of "D" or better, the amount already paid to me must be paid back to McDonald's. I authorize McDonald's to deduct a minimum payroll deduction of \$75.00 per pay period from my paycheck commencing 60 days after McDonald's Service Center sends notice of my pay back obligation.</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:
	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 Certified Swing, General Manager,  
Restaurant Manager Employee & Store Manager Trainee

### 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 Restaurant-Educational Assistance Program if they:

- Are General Managers, Restaurant Managers, Certified Swing Managers or Store Manager Trainees who are Benefits Eligible.
- Have a performance rating of "significant performance" or better 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, societies and organizations 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.

The following review courses (**not the exams**) also may be eligible for educational assistance:

SHRM/PHR          CPA          GMAT          GRE

Bar exams are not eligible for reimbursements under the 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 \$5,250 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 request form (with necessary approval), and copies of the receipts (retain the originals for your records). If the grade is below "D" the employee will be required to return the reimbursement through payroll deduction.
- Reimbursement will be included in the employee's regular paycheck. Failure to provide the required documents upon submission may delay reimbursement.

If an employee should fail to submit a grade within 3 months of course end date, receive a grade below a "D", or drop the class, the 100% reimbursement already paid, must be paid back to McDonald's.

**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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