



# External Course-Staff Tuition Assistance Program Pre-Approval Request

Pre-approval is a requirement for reimbursement. Complete and send this form (with supervisor approval) to Benefit Strategies at least 45 days prior to the start of your course. Reimbursement will only be considered for courses that were pre-approved prior to the beginning of the course. You and your supervisor/manager must explain how the course is directly job-related (current and/or imminent job changes) for tuition to be considered for reimbursement. Deadlines, other requirements, and limitations apply.

First Name (Legal)

Middle Initial Last Name

Berklee ID (Required)

Phone Number

Email

Supervisor / Manager

## Course #1 Information

Calendar Year

Course Start Date

Course End Date

Tuition Cost

Course Title

\$

Name of Institution

Explanation of Direct Job-Relatedness (attach separate sheet if needed)

## Course #2 Information

Calendar Year

Course Start Date

Course End Date

Tuition Cost

Course Title

\$

Name of Institution

Explanation of Direct Job-Relatedness (attach separate sheet if needed)

## Required Signatures

Staff Member

Date

I understand that the following courses qualify for reimbursement: (1) Academic courses leading your first undergraduate degree. (2) Academic or trades-related courses that provide knowledge that will enhance your performance significantly in your job. (3) Undergraduate or graduate academic courses that prepare you for advancement in your present field or a known future assignment. (4) If I leave Berklee employment voluntarily, I must repay the college any reimbursement I have received within 6 months of the end of my employment. (5) I hereby authorize Berklee College of Music to deduct from my final salary payment any such amount due. If such withholding is less than the amount due I will pay the balance directly to Berklee College of Music within 30 days of the end of my employment. Other requirements and limitations apply as outlined at: <http://www.berklee.edu/human-resources/staffprofessional-developmenttuition-benefits>

Supervisor / Manager

Date

Supervisor / Manager Explanation of Direct Job-Relatedness (attach separate sheet if needed)

## Deadline for Submission

Your completed External Course - Staff Tuition Assistance Program Pre-Approval Request form must be submitted at least 45 days prior to course start date. Pre-approval is a requirement for reimbursement. Reimbursement will only be considered for courses that were pre-approved prior to the beginning of the course.

## How to Submit:

Send all submissions to Benefit Strategies via email, mail, or fax:

**Email**  
tuition@benstrat.com

**Mail**  
Benefit Strategies, LLC  
PO Bo 1300  
Manchester, NH 03103

**Fax**  
603-647-4668

When the pre-approval request is received and a determination is made regarding eligibility, Reimbursement will only be considered for courses that were pre-approved prior to the beginning of the course.

## How to Request Tuition Reimbursement

After you complete your course, please go to [www.benstrat.com/berkleetuition](http://www.benstrat.com/berkleetuition) no later than 90 days after course end date to complete the application process.

## Reimbursement Maximum

The annual plan year dollar cap amount (less than 3 years \$2500, more than 3 years \$4000) will be administered on a plan year basis (1/1-12/31) based on course start date. For example, if your course started on September 1, 2018 and you submit for reimbursement in February 2019, your reimbursement will be applied to your calendar year 2018 total for purposes of tracking the maximum benefit limit (less than 3 years of service \$2,500, more than 3 years of service \$4,000).

In no case will total reimbursement paid in a calendar year exceed the applicable pre-tax limit in Section 127 of the IRS Code - (\$5,250). For example, if \$4,000 is paid on Jan 15, 2019, for courses starting in 2018, you would only be eligible for an additional \$1,250 in reimbursements dated in 2019 due to this maximum. Amounts above the \$5250 would not be paid.

## Additional Information

Benefit Strategies can also be reached at:

You can also visit

<http://www.berklee.edu/human-resources/staff-professionaldevelopmenttuition-benefits>

**Toll Free**  
1-888-401-FLEX (3539)

**Email**  
info@benstrat.com

**Online Chat**  
[www.benstrat.com](http://www.benstrat.com)

**Hours**  
8am-6pm Mon-Thurs  
8am-5pm Fri