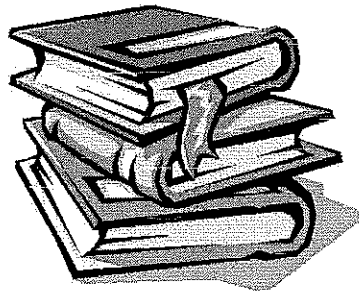


PROCEDURE FOR COURSE REIMBURSEMENT

Staff members are eligible for reimbursement per your contract agreement for the courses that inform and enhance professional practice, and are taken at an accredited college or university. To ensure that courses align with Educator Plan and/or Individual Professional Development Plan for licensure, courses must be approved in advance by the building principal, department head, or supervisor. This tuition reimbursement amount is limited to your negotiated contract language. A check will be issued upon successful completion of the course(s) and submission of all required documents.



REQUIREMENTS: Must have all requirements in order to submit

Your course reimbursement form must be approved and signed by your principal, department head, or supervisor PRIOR to registering for the course. (Forms are available on the district website or at your school.) Do not submit to Human Resources until the course is completed and you have all the paperwork needed for the reimbursement(s).

When the course is completed, please submit to Human Resources: 1) **the approved and completed course reimbursement form**; 2) **a completed W-9**; 3) **a transcript showing credits earned**; 4) **proof of payment** (a copy of both sides of your cancelled check, matching credit card bill, or a copy of other form of tuition payment receipt with your name printed on it). The receipts must match the exact cost of the course.

Please note that reimbursements take approximately 10 weeks and will be Mailed to your address on file.

If credits are to be used for a salary upgrade, a written request for an upgrade and official transcript(s) must be submitted to Human Resources separately.

Please forward all documents to Lisa Murphy in Personnel.

**CITY OF LOWELL
LOWELL PUBLIC SCHOOLS
EMPLOYEE COURSE REIMBURSEMENT FORM**

DATE _____

EMPLOYEE NAME: _____ EMPLOYEE # _____

MAILING ADDRESS: _____ EMPLOYEE VENDOR # _____

_____ SCHOOL: _____

_____ POSITION: _____

May I request your approval for the following course(s) for professional improvement for the 2019/2020 school year

NAME OF COURSE	Course Start Date M/D/Y	Course Ending Date M/D/Y	COURSE LOCATION	TOTAL \$ COST
			Grand Total	\$0.00

Description of Course (**REQUIRED**):

**** A CHECK WILL BE MAILED TO THE EDUCATOR FOLLOWING THE PROCESSING OF THE REIMBURSEMENT PACKET**

Employee

Signature _____ Date _____

I certify under the penalties of perjury that the above charges are true and accurate.

I have reviewed and verified the authenticity of this request for reimbursement for the above mentioned employee:

Principal/Department Head

Signature _____ Date _____

Approved Yes
No

I have reviewed and verified the authenticity of this request for reimbursement for the above mentioned employee:

Human Resources

Signature _____ Date _____

Approved Yes
No

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
Print or type. See Specific Instructions on page 3.	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶ _____	(Applies to accounts maintained outside the U.S.)
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
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Employer identification number									
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Part II Certification

- Under penalties of perjury, I certify that:
- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
 - I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
 - I am a U.S. citizen or other U.S. person (defined below); and
 - The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding, later*.