

Adoption Benefit

Frequently Asked Questions

What types of adoptions are covered?

Adoption assistance is provided to eligible employees who are adopting an eligible child who is either under the age of 18 or is physically or mentally incapable of caring for him/herself.

Will expenses related to the adoption of a stepchild be reimbursed?

Expenses for the legal adoption of the child of your spouse are excluded from the program. The program also excludes adoption expenses incurred for the adoption of a child of your same-sex domestic partner, or domestic partner.

My spouse and I both work for University Hospitals. What is the maximum amount of reimbursement we can receive?

University Hospitals will reimburse you and your spouse up to a maximum of \$2,500 for the qualified expenses related to the legal adoption of a single child or sibling group adoption. The benefit is payable per child or sibling group, not per employee.

What types of expenses are eligible for reimbursement under the program?

The following types of expenses may be considered for reimbursement:

- Adoption fees
- Attorney fees
- Court costs
- Travel expenses (including meals and lodging) while away from home
- Re-adoption expenses relating to the adoption of a foreign child

Are there any expenses that are not eligible for reimbursement under the program?

The following types of expenses are not eligible for reimbursement:

- Expenses for which you received funds from any state, local, or federal program
- Expenses that violate state or federal law
- Fees for carrying out a surrogate parenting agreement
- Fees for the adoption of the child of the employee's spouse
- Fees paid for or reimbursed by any other person or organization
- Expenses paid or incurred prior to 2007
- Expenses allowed as a credit or deduction under any other provision of federal income tax law

Is adoption expense reimbursement taxable income?

The reimbursement of qualified adoption expenses under the program may be excluded from wages subject to Federal income tax withholding. Further information and forms are available from the IRS at 1-800-TAX-FORM or www.irs.gov.

When may I request reimbursement?

The University Hospitals Qualified Adoption Assistance Program is effective January 1, 2007. If your adoption is finalized in 2007, you may submit eligible expenses incurred in 2007 for reimbursement.

Can I submit qualified expenses incurred prior to my eligibility or employment with University Hospitals?

To be eligible for reimbursement, the qualified expenses must be incurred and submitted while you are an eligible employee.

The adoption of my child was final this year. Can I be reimbursed for eligible expenses under this new program retroactively?

The University Hospitals Qualified Adoption Assistance Program does not allow for reimbursement of expenses incurred prior to the effective date of the benefit, which is January 1, 2007.

I am in the process of adopting a child. Can I be reimbursed for eligible expenses I have incurred in 2006 under this new program?

Expenses incurred in 2006 are not eligible for reimbursement. If the adoption is final in 2007, you can submit qualified adoption expenses incurred after January 1, 2007 for reimbursement.

What procedure should I follow to obtain reimbursement?

You will complete and submit an adoption assistance reimbursement request form to Human Resources, along with a copy of the adoption placement decree. Documentation of expenses related to the adoption will be required.

How will I be reimbursed?

Once your reimbursement request has been approved, reimbursement will be made through payroll. The total amount reimbursed will appear on your W-2 at the end of the year.