

Adoption Assistance Policy

The University will reimburse eligible employees up to a maximum of \$5,000 for itemized adoption-related expenses or agency and non-stepchild adoptions. Reimbursement will occur after the adoption is finalized. In cases where the adopting parents are both University employees, only one \$5,000 reimbursement allowance will be applied.

Reimbursement is not payable for the adoption of stepchildren or for pre-natal or maternity costs of the birth mother of the adoptive child. An adopted child must be under the age of 18 at the time the adoption becomes finalized.

The *Adoption Assistance Reimbursement Request Form* (see below), a certified or notarized copy of the adoption placement decree or court order of placement, and itemized receipts may be submitted up to six (6) months after placement of the child in the employee's home. No requests may be submitted after the six-month period has ended.

The adoption reimbursement benefit may be utilized only once during a calendar year.

Examples of such expenses include the following:

- licensed agency fees
- counseling fees
- placement fees, legal fees and court costs
- state-required home-study fees
- travel expenses
- adopted child's passport and/or visa fees
- immigration, immunization & translation fees
- document authentication fees
- temporary foster care costs

If an employee voluntarily separates from the University within six (6) months after utilization of the Adoption Reimbursement benefits, the employee will be required to reimburse the University for the amount of the benefit received.

Taxation of Benefits

The adoption assistance benefit is generally not subject to federal or state tax withholding, but is subject to Federal FICA and California VDI/SDI withholding and will be reported on your IRS Form W-2. Employees should confer with their own tax advisors prior to participation in this benefit.

Coordination with Other Benefits

At the time of placement, you may add your child to your benefits coverage. Please do so within 30 days of adoption. You will need to submit a certified copy of the adoption placement decree or court order of placement as well as a copy of the birth certificate to enroll your child for benefit coverage.

Checklist of Papers to Submit for Reimbursement of Expenses:

- Adoption Assistance Reimbursement Request Form,*
- Certified or notarized copy of the adoption placement decree or court
- Expense receipts or statements

Send the necessary forms to USF via fax at (415) 386-1074 or U.S. mail to:

University of San Francisco
Attn: Human Resources, Director of Employee Benefits
2130 Fulton Street, Lone Mountain Main 339
San Francisco, CA 94117



CHANGE THE WORLD FROM HERE

If you have any questions,
team at <mailto:benefits@usfca.edu> or 415-422-2442.

please contact the benefits