



## **Adoption Assistance Program**

Adoption is an exciting time for families, and Immanuel wants to support employees and their families as they proceed through the process. We recognize that long with the joy, the adoption process can also be stressful and require a financial commitment. Immanuel offers The Adoption Assistance program to provides financial assistance to help cover some of the costs of legally adopting a child as well as emotional support through the EAP

Immanuel Health Systems will reimburse eligible adoption expenses up to \$3,000 per eligible adoption, up to two adoptions per lifetime.

Adoption assistance guidelines and application are attached.

### **Purpose**

The Immanuel Adoption Assistance Program is designed to provide financial assistance to eligible employees toward meeting the expenses of adoption.

### **Eligible Employees**

All active, full-time (.7 and above), employees are eligible for the Adoption Assistance Program on the first of the month following 30 days.

### **Qualified Adoptions**

Adoption benefits are limited to the adoption of children under the age of 18, not currently associated with the family. This applies to both domestic and foreign adoptions.

### **Program Benefits**

The Adoption Assistance Program will reimburse eligible employees for covered expenses up to \$3,000 per adoption, for up to two adoptions per family. The reimbursement applies for legal adoptions.

To receive benefits, the eligible employee must be actively employed by Immanuel when the child becomes a legal dependent and is placed in the employee's home, and when the expenses are incurred.

Benefits received under the Adoption Assistance Program are excluded from an employee's income for the income tax purpose. (Note: this exclusion is phased out for taxpayers with adjusted gross income of \$75,000 or more. Consult your

tax advisor for further details about this exclusion and any tax credit that may be available).

**Eligible Expenses:**

- ❑ Legal expenses related to the adoption process (attorney fees and court costs)
- ❑ Medical expenses for the birth mother (if adopting an infant)
- ❑ Licensed adoption agency fees (including fees for placement and parental counseling).
- ❑ Charges for transportation, travel, translation, lodging and immigration fees to obtain physical custody of the adoptive child.
- ❑ Charges for temporary foster care before placement (must be provided by an approved or licensed agency and is limited to 30 days).

**How to file a claim for benefits**

To file a claim for benefits, the eligible employee must submit an adoption assistance program application form, along with any itemized bills and verification documents to the Corporate Human Resources Department. Adoption Assistance Program Application may be obtained from the Benefits Website

# Immanuel Adoption Assistance Program Application

## Personal Information

\_\_\_\_\_  
Employee name

\_\_\_\_\_  
Employee ID #

### Itemized expenses

Please list the expenses for which you are claiming reimbursement under the Immanuel Adoption Assistance Program. You must attach a receipt for each expense listed. Please consult your tax advisor if your adjusted gross income is \$75,000 or more (at this income level, all or part of this benefit may be subject to taxation). Ask Linda-this amount may have increased

Description:

Amount:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

*Note: expenses submitted are not eligible for reimbursement until the adoption is finalized and supporting documentation is submitted.*

### Verification of Adoption

You must attach verification that the adoption is final. Acceptable documentation includes a copy of the adoption papers or court order, or re-issued birth certificate with notarized letter from attorney or agency stating date that adoption is final. Your claim cannot be processed without appropriate verification.

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
date

Submit completed form and attachments to:  
Immanuel

[MyHR@immanuel.com](mailto:MyHR@immanuel.com)