

# **Dominion Energy Ohio UWUA Local G555**

## ***Education Assistance* Summary Plan Description**

## **INTRODUCTION**

Dominion Energy values the knowledge, skills, and talents necessary to develop our employees, accomplish our business goals, and to continue as a quality and competitive company. The Education Assistance Program is designed to help you increase your effectiveness in your current job and prepare you for greater responsibility within Dominion Energy.

Your management is responsible for determining that any course for which reimbursement is sought is of mutual benefit to you and Dominion Energy. Management considers such factors as how related the course work is to your job or profession and whether the program of study provides you with the knowledge or skills that would help you in your current or future work with Dominion Energy. The courses must not conflict with your normal work schedule.

Benefits described in the Summary Plan Descriptions (SPD) are current as of the date indicated at the bottom of the page. Dominion Energy may subsequently provide additional materials that supplement, update or amend the SPDs that will provide you with information regarding changes to your benefits.

Please see the "Additional Information" Summary Plan Description document for details on other rights pertaining to your participation in Dominion Energy's Benefit Plans in general. However, please note that the Education Assistance Program is not subject to the requirements of ERISA and other legal requirements outlined in the "Additional Information" section.

**EDUCATION ASSISTANCE PROGRAM**

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## ELIGIBILITY

All active Local G555 employees are eligible to participate in the Education Assistance Program.

Eligibility begins on your first day of work with Dominion Energy. The Education Assistance Program covers only those expenses for courses that start after you become eligible for the program.

## HOW THE PROGRAM WORKS

The program reimburses 100% of eligible education expenses, up to a maximum of \$7,500 per calendar year (January 1 to December 31). Up to \$5,250 per year will be reimbursed on a tax-free basis. Any reimbursements exceeding \$5,250 will be taxable to you. The program does not provide for reimbursement of a class that you have not paid for, for example if you received student grants or deferred fees.

The Education Assistance Program requires that:

1. Courses be taught by an *accredited* college, university or school listed in the publication titled "Accredited Institutions of Post-Secondary Education";
2. You complete the course with the following grade:
  - A, B, or C for General Educational Development (GED) and undergraduate courses; or
  - A or B (including minuses) for graduate and doctorate level courses; or
  - a grade of "pass" for courses graded on a pass/fail basis.
3. You submit a receipt of payment for tuition, fees and textbooks;
4. You submit an *Education Assistance Application & Service Repayment Agreement* form within a maximum of six months from the date that you complete the course(s); and
5. Both you and an approver sign and date the *Education Assistance Application & Service Repayment Agreement* form.

## WHAT THE PROGRAM COVERS

The Education Assistance Program provides reimbursement for approved courses that are part of the following programs:

- General Educational Development (GED);
- Undergraduate courses (includes associate's degree (2-year program) and bachelor's degree (4-year program));
- Graduate courses (includes master's degree); and
- Doctorate level programs (requires written approval from the appropriate group vice president prior to enrollment in course work).

The Program provides reimbursement for any and all courses taken that lead to a degree, diploma or GED certificate that are of mutual benefit to the employee and Dominion Energy. The Program also applies to single courses that are job related. This

includes, but is not limited to: on-line courses, accelerated courses, executive MBA courses and fast track educational programs.

Items eligible for reimbursement include:

- Tuition;
- Required textbooks, including text materials purchased on a CD-ROM format. There is one reimbursement per textbook, even if the text is used for multiple classes; and
- All course related fees including:
  - Application/registration fees;
  - Activity fees/general fees;
  - Transcript fees/auxiliary fees;
  - Lab fees/technology fees;
  - Software fees associated with software considered textbook or course material;
  - Library fees;
  - Facility fees;
  - Health fees; and
  - Student ID card (but not replacement cards).

Prior to enrolling in a class, verbal approval from your immediate supervisor/manager is required to determine if the course(s) is beneficial for you and Dominion Energy. For a doctoral program course, written approval from the appropriate vice president is required prior to enrollment.

If you are uncertain as to whether or not a course will be eligible for reimbursement under the Program, please submit a ticket via the HR Catalog > [Education Assistance Program](#) prior to enrolling in the course.

### **WHAT THE PROGRAM DOES NOT COVER**

The following are specifically excluded from reimbursement under the Education Assistance Program. This list is not all-inclusive.

#### **Course Related Items**

- Professional certification courses that are not granted college credit by an accredited institution;
- Seminars or courses which earn continuing education units;
- Preparatory courses (e.g., Real Estate or CPA);
- Dale Carnegie courses;
- Courses taken on an audit basis; and
- Tuition and related costs for credits granted in the absence of the completion of course work, such as credits awarded for “life experience”.

#### **Fee Related Items**

- Installment fees;
- Entrance exam fees;
- Deferment fees;
- License fees;

- Graduation, cap and gown fees, etc.;
- Athletic fees; and
- Any fees not required by an institution in order to take a class.

### Other Related Items

- Equipment or tools (e.g., calculator) that you retain following the completion of the course;
- Lodging, parking, transportation, fuel recovery charge;
- Graduate program entrance examinations;
- Interest/finance charges, late fees;
- Replacement student ID cards;
- Postage, shipping and handling charges;
- Computer software systems or other software not considered textbook material;
- Computer and other computer hardware items; and
- Other costs not consistent with the purpose of the program

## APPLICATION PROCESSING

After completing the course, you must complete an *Education Assistance Application & Service/Repayment Agreement*. The Education Assistance Application can be found on HR Home. From HR Home, search "Education Assistance" to access the Education Assistance article. The link to the Education Assistance Application form can be found at the bottom of the article.

Send the following to [HRempservicesinbox@dominionenergy.com](mailto:HRempservicesinbox@dominionenergy.com) for processing:

- The original *Education Assistance Application & Service/Repayment Agreement* form with your signature and the signature of your immediate supervisor/manager;
- Your official grade report; NOTE: due to the time constraint of obtaining official grade reports to meet end of year payroll deadlines for same year reimbursement, an email or letter on school letterhead from your professor will be accepted as confirmation of completion of the course and the pending grade for coursework that concludes in proximity to year end.
- A paid receipt and detailed billing statement from the educational institution to include charges and payments for tuition and eligible fees is required. The statement is requested to determine whether the applicant has received any grants, discounts, GI Bill or scholarships;
- A paid receipt and detailed billing statement from the educational institution for covered fees; and
- A paid receipt and detailed billing statement for each textbook and/or software purchase to include the applicant's information, title of each textbook and/or software, cost of each item and payment by the employee is required. The statement is requested to determine eligible expenses for reimbursement. Shipping and Handling and Postage are not eligible expenses for reimbursement.

If you have any questions, please contact the Dominion Energy HelpLine at 1-877-947-4636.

## REIMBURSEMENT

Dominion Energy reimburses you for approved courses up to a maximum of \$7,500 per calendar year (January 1 to December 31). If any portion of the \$7,500 limit is not used, it does not carry over to the next calendar year. Reimbursements in excess of \$5,250 in a calendar year are treated as taxable income and subject to the applicable payroll tax reporting and withholding rules.

Reimbursements for classes are applied to the calendar year maximum for the year in which the reimbursement is paid. Please note that expenses associated with a single course can only be submitted for reimbursement in a single year (for example, if you have submitted expenses for a class to be reimbursed in the current year, you cannot submit additional expenses for that same class to be reimbursed the following year).

Once the *Education Assistance Application & Service/Repayment Agreement* form is received, reimbursements will be processed as soon as administratively feasible.

If you receive other funds for reimbursement, such as through G.I. Bill programs, veterans' benefits, scholarships, grants, etc., Dominion Energy pays you the amount it would have paid for the course less the amount of other funds received.

You have a maximum of six months from the date that you complete the course(s) to submit an *Education Assistance Application & Service/Repayment Agreement* form, along with required documentation, for reimbursement.

Reimbursements are made through your paycheck.

## Reimbursements Under Special Situations

### Severance

If you are enrolled in a course that has been approved for coverage under the Education Assistance Program and your employment is severed under circumstances that make you eligible for benefits under the Dominion Energy Severance Program, you are eligible to receive reimbursement, if the course started prior to the beginning of the two-month advance notice period. Once advance written notice of the severance has been provided, no new courses are approved. If your employment is involuntarily terminated under any other circumstances, you will receive no further reimbursement from the Plan even if the course was previously approved.

### Leave of Absence

If you are on an approved leave of absence under the Family and Medical Leave Act (FMLA), Worker's Compensation, or on military leave after having received verbal approval to take a class, and you complete the class, you remain eligible for reimbursement.

### Service/Repayment Agreement

In the event that you voluntarily terminate employment with Dominion Energy, you are obligated to reimburse Dominion Energy an amount equal to the total payments made to you under the Dominion Energy Education Assistance Program during the 12 months immediately prior to your termination. Repayment must be completed within a reasonable timeframe, within no longer than a 12-month period following termination, to

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avoid recurring tax and accounting processing for each year in which an outstanding balance is carried forward.

The service/repayment guideline applies to all degree programs, or ongoing programs of study, as well as for single courses taken by an employee. For purposes of this policy, the date of the last reimbursement will be considered the date reimbursement was paid out. Repayment is not required if the following events occur within the 12-month period: retirement, death, and disability.

### **UPDATING YOUR EDUCATIONAL RECORD**

Go to the HUB under My Info to update your educational record when you complete a degree.

You can also submit a request for reimbursement or ask questions about the program through the HR Catalog.

To request service, use HR Catalog > [Education Assistance Program](#).

### **CHANGING OR TERMINATING THE PROGRAM**

Except as set forth in the following paragraph, no changes affecting benefits provided under the Education Assistance Program may be made without the written consent of the Executive Committee of the Union.

Dominion Energy reserves the right to amend the Program and revise the Summary Plan Description at any future date, without the consent of the Executive Committee of the Union for the following reasons: (1) to make nondiscretionary changes that are required to comply with federal and state laws, regulations and official regulatory guidance of general applicability, (2) to make changes in the organizations engaged to administer the program, or (3) to update contact names, phone numbers, physical addresses, internet addresses or similar information. In the event of any such change, Dominion Energy shall provide written notice of the change to the Executive Committee of the Union within thirty (30) days before the effective date of the change, or as soon as practicable thereafter.