



# Adoption Expense Reimbursement Program

PG&E provides an adoption assistance benefit of up to \$2,000 per child to help pay for adoption-related expenses when you adopt a child. The adoption can be completed independently or through a public or private agency.

Complete this application form once you have received your Decree of Final Adoption, and submit it to the PG&E Benefits Service Center to be reimbursed for your eligible expenses. You must include a copy of your Decree of Final Adoption, together with copies of your expense receipts. Please mail copies of documents only. Do not mail originals as they will not be returned.

Additional information about the program and answers to frequently asked questions are provided in this application package.

### PLEASE PRINT

Employee Name: \_\_\_\_\_ Personnel Number: \_\_\_\_\_

Home Street Address: \_\_\_\_\_

City/State/ZIP Code: \_\_\_\_\_

Home Phone No.: \_\_\_\_\_ Work Phone No.: \_\_\_\_\_

Child's Legal Name: \_\_\_\_\_

Is this adopted child a stepchild  Yes  No Date of Decree of Final Adoption: \_\_\_\_\_

Is your spouse/domestic partner a PG&E employee?  Yes  No

If "no," is he or she eligible for adoption reimbursement benefits from another company?  Yes  No

If "yes," please provide spouse/domestic partner's name: \_\_\_\_\_

If "yes," please provide name, address and phone number of company:

Company Name: \_\_\_\_\_

Full Address: \_\_\_\_\_

Name of Contact Person: \_\_\_\_\_ Phone No: \_\_\_\_\_

List the expenses you are claiming here and attach the itemized statements and receipts for each item listed. Also include a copy of your Decree of Final Adoption.

Explanation of Services	Amount	Date of Service



## Adoption Expense Reimbursement Program

Explanation of Services	Amount	Date of Service

I certify that the expenses claimed above qualify for reimbursement under the PG&E adoption expense reimbursement program.

Return this form with the required attachments via facsimile:

Fax # **855-373-1237**

OR

Return this form with the required attachments via mail:

PG&E Benefits Service Center  
PO Box 9740  
Providence, RI 02940-9740

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_



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## Adoption Assistance Program Information

### Who Is Eligible

All regular full-time and part-time PG&E employees who have completed six months of continuous service are eligible for reimbursement for each child under 18 that you adopt. You are eligible to apply for reimbursement:

- If you are actively employed or on an approved leave of absence when the adoption becomes final. If your employment ends before the adoption is final, you will not be eligible for reimbursement through this program.
- Only after you obtain the Decree of Final Adoption. Applications must be submitted within one year of date of final order.
- If both you and your spouse/domestic partner are PG&E employees, only one of you will be reimbursed for adoption expenses. If your spouse/domestic partner has another employer that offers an adoption expense reimbursement, the plans will be coordinated so that no more than 100 percent of covered expenses are paid.

Interns, non-employee, contractors, agency workers, hiring hall employees and retired employee are not eligible.

### What's Covered

PG&E will reimburse 100 percent of eligible expenses, up to a maximum of \$2,000.

Eligible expenses include:

- Legal fees.
- Court fees.
- Adoption agency fees.
- Placement fees.
- Medical expenses for the child related to the adoption and not covered by a medical plan, such as immunizations and checkups.
- Transportation expenses associated with picking up the child (must be reasonable and customary and documented by court papers).

You may be able to take advantage of both an income tax credit and the adoption expense reimbursement program. However, you cannot claim both an income tax credit and a reimbursement for the same expense. Before submitting your adoption expense reimbursement program application, you may want to consult with your tax advisor to determine how to take maximum advantage of both the tax credit and the reimbursement program.



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### Frequently Asked Questions (FAQs)

**Q: Why does PG&E offer a program to reimburse expenses for adoption?**

A: Biological parents receive financial support for having children through existing medical plans. Adoption reimbursement results in a more equitable distribution of benefits for employees who want to create a family through adoption.

**Q: Will this program help me with locating an agency for adoption?**

A: No. This program is designed to provide financial assistance for the adoption process.

**Q: What adoption expenses are reimbursable?**

A: Legal, court, and agency fees, as well as medical fees related to the adoption for the child not covered by a medical plan and transportation expenses to pick up the child.

**Q: Are expenses for the birth mother, such as those involved with counseling and medical, covered?**

A: No.

**Q: How much of my adoption expenses are reimbursable?**

A: Eligible adoption expenses may be reimbursed up to \$2,000 per adoption.

**Q: Is the adoption of stepchildren covered by this program?**

A: Yes. You are eligible to use this program to adopt a stepchild. You will not be reimbursed for expenses incurred by your spouse/dp to adopt your child.

**Q: Does the program have a limit on the number of adoptions eligible for reimbursement?**

A: No. You are eligible for reimbursement for each child that you adopt.

**Q: Am I entitled to child care leave once I've adopted a child?**

A: Yes. Both mothers and fathers are eligible for a six-month to 12-month leave, just as are biological parents. Please check with the Leave Management team at 415-973-HELP (415-973-4357) for more information about leaves of absence. You can also send an e-mail to [humanresources@exchange.pge.com](mailto:humanresources@exchange.pge.com).

**Q: If both my spouse and I are employees, can we both apply?**

A: No. Just one spouse is eligible for reimbursement.

**Q: Is the program available to employees in PG&E subsidiaries?**

A: Yes, if you are a regular full-time or part-time employee of any of PG&E's domestic subsidiaries and affiliates.



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**Q: Will any taxes be withheld from the reimbursement?**

A: Yes, current laws require that adoption benefits in the form of cash assistance are subject to income tax regulations. Note: You may be able to take advantage of both an income tax credit and the PG&E adoption expense reimbursement program. Check with your tax advisor for more details.

**Q: How is reimbursement sent to me and how long does it take?**

A: Your application will be processed within 4 weeks, and the amount will be reflected in your regular paycheck. To avoid delays, remember to submit all of the information requested on the application.

**Q: Will I get any of my documents back?**

A: No; be sure to send copies with your application.

**Q: What happens if the adoption falls through?**

A: You are not eligible for reimbursement until the adoption is final and you have received the Decree of Final Adoption from the court.