Texas Annual Conference of the United Methodist Church
Center for Clergy Excellence
Group Health Benefits

Policy 145

Adoption Policy

Effective January 1, 2014, Policy 145 – Adoption Policy is amended as follows:

Active employee participants of the Group Health Benefits Plan as of the date of adoption are eligible to receive up to a maximum of $5,000 for reimbursement of adoption-related expenses per adopted child. Eligible expenses include home study expenses, legal fees, court document preparation, travel expenses, adoption agency fees, birth parent counseling, adoptive parent preparation and training, social work services, medical expenses for the birth mother (as allowed by law), and other related adoption expenses. Eligibility of any adoption expense for reimbursement will be determined by the Center for Clergy Excellence. All decisions are final.

Participants must complete the form below and submit this page along with itemized receipts and a copy of the adoption decree to the TAC Benefits Office for reimbursement within one year of the date of adoption. ***A 1099-Misc. form will be issued by the TAC Benefits Office for all reimbursements in excess of $600 under this program.***

Adoption Reimbursement Form

Complete the information below and submit this page along with itemized receipts and a copy of the adoption decree within one year of the date of adoption to the TAC Benefits Office, 5215 Main St., Houston, TX 77002 for reimbursement. Additional items can be listed on the back of the form if more space is needed.

*(*Mileage reimbursement is $0.15/mile for eligible adoption-related mileage expenses because only the cost of gasoline can be reimbursed, not other expenses related to the operation of a vehicle).

Participant Name (print) _____ SSN_____

Address _____ City _____ State _____ Zip _____

Phone _____ Email _____ Date _____

Name of Adopted Child _____ Date of Birth _____ Date of Adoption _____

Adoption Expense	**Amount**
Total	