



University-wide Child Care Scholarships Programs

FAQ: Child Care Scholarships (2023-2024)

***Administrative & Professional Staff and non-Union support staff, Postdoctoral Fellows,
Other academic teaching and research faculty, and non-tenure-track faculty***

Part 1: The Scholarship Application and Family Eligibility

1. How do I know if I am eligible to apply?

To be eligible for the University-wide program you and your household must meet each of these five criteria:

1. **YOU** work in a benefits-eligible position:
 - working at least half-time (17.5 hours per week or more)
 - paid by the President and Fellows of Harvard College on a regular Harvard payroll;AND
2. **YOU** are employed in one of the following eligible capacities:

Job Title	Pay Group	Employee Group Code
Administrative & Professional Staff	PFX	A
Non-Union Support Staff	PON	A/S
Employee Postdoctoral Fellow	MIP	Y
Stipendee Postdoctoral Fellow	MEP	Z
Other Academic	MFC	O
Non-tenure-track Faculty	MFC	J/F

AND

3. If you have a spouse/qualified domestic partner, **they are formally occupied** for at least 15 hours per week. Documentation of employment, intern position, or student status must be provided (partner disability or caring for a disabled person also qualifies); AND
4. **GROSS HOUSEHOLD INCOME (HHI):** Your projected gross HHI, adjusted for family size, falls under the income caps for family size shown below. Income is adjusted by the Office of Work/Life in the following way:
 - Single parent household: \$10K is added to the income cap
 - Households with more than one child aged under 13 years: \$10K is added to the income cap for each additional child aged under 13 years beyond the first, up to three additional children.

1-child	< \$150,000
2-child	< \$160,000
3-child	< \$170,000
4 or more children	< \$180,000

AND

5. **CHILD(REN):** You have at least one child under the age of 13 who is/are:

- Born on or after July 1, 2010,
- Your legal dependent(s) verified by your tax return and you must be responsible for their child care costs (unborn, newborn, or newly-adopted children are exempted from the tax dependency verification requirement)
- In an eligible form of child care for reimbursement purposes (see #9 below).
- Those families with children who have documented special healthcare needs can still apply for their teenage children.

2. What if I still do not know if I am eligible?

Please ask your administrator what your specific “Paygroup Code” is. Compare it to the codes listed above.

3. Can I apply if my baby is not born yet?

Yes! As long as you will use and pay for child care before June 30, 2024, you can apply for the scholarship.

4. Can I apply if my child is not yet formally enrolled in a program?

Yes! The application asks for enrollment information and costs or your best estimate of what your costs will be from July 1, 2023 through June 30, 2024.

5. Can I use the scholarship to pay my mother, father, or other family member?

Yes! You can use scholarship money to pay any relative who cares for your children, as long as this person:

1. Does not live with you, and
2. Has a valid SSN or Tax ID number, and
3. Provides care while you or your spouse are at work.

6. Can I use the scholarship to pay my babysitter or nanny?

Yes! This is an eligible expense if the babysitter or nanny provides care while you or your spouse are at work. As mentioned above, your babysitter MUST have a Social Security or Tax ID number. The only exception to the “live-in” rules applies to formally-employed nannies, who may reside in your home. Agency placement fees are also eligible for reimbursement under the ACCESS program.

7. Can I use the scholarship to pay for my child’s care even if my spouse is not working?

While there may be compelling reasons to place a child into care even though there is an adult at home capable of providing care, such families will generally not be eligible for assistance. Our limited funds are prioritized for those families where child care is a necessity because noone is at home to provide the care.

8. Can I apply if I don’t know what kind of child care I’m going to use?

That’s fine - you can still apply. Scholarships are “reserved funds” and are based on your adjusted gross household income. You will receive an award email confirming the award amount for which you have been verified. You will be reimbursed for child care expenses, up to your award amount, after you demonstrate that you have paid them. Further, changing the type of care you use later will not affect your award as long as it remains ‘qualifying care’ (see #9 for the definition).

9. What kinds of child care can I use the scholarship funds for?

You can use the funds from the child care scholarship and be reimbursed up to your award amount for the costs of:

- A licensed child care center,
- A licensed family child care provider,
- A licensed after-school program,
- A licensed summer/vacation day camp,
- An in-home caregiver, such as a nanny or babysitter, with a valid SSN or Tax ID number.

10. What if my spouse also works at Harvard?

Scholarship awards are given per family, so only one person need apply, and the award from the program with the highest value will be given to that family. However, if your spouse is in a union position (HUCTW, or a Service and Trade union), they should apply to that program as well. The Office of Work/Life will work closely with the union child care scholarship program administrators to determine the best award for these dual-Harvard families.

11. How do I access the online application?

Please log in to PeopleSoft with your HarvardKey (you can access PeopleSoft via hr.harvard.edu). During the open application window, select the PeopleSoft link, click on the “My Self-Service” > “My Benefits” tiles, select the “Child Care Scholarship” tile, and click on “Child Care Scholarship App.” Complete the pre-questions, and then select “Begin Application.”

12. When is the deadline and what if I miss it?

The online application is open from **Wednesday, July 12 through Wednesday, July 26, 2023.**

This means that the application must be submitted online (via PeopleSoft) by 11:59pm on July 26 AND the supporting documentation must be submitted electronically to the Office of Work/Life. Specific instructions are emailed upon submission and are also found in the application.

A smaller, second round for newly-hired, eligible faculty and staff (hired after 8/1/2023 through early September, 2023) will be open online in PeopleSoft from Wednesday, August 30 through Wednesday, September 8, 2023.

All funds are awarded at one time, so applications can only be accepted once per year.

Part 2: The Application and Award Process: Timeline

13. What information will I need to complete my application?

The program uses a sliding scale based on family income to determine awards (see #18 for basic award tiers). The application therefore asks you for information on **your family's anticipated income from July 1, 2023 through June 30, 2024 (Harvard's fiscal year)**.

Before you begin the application, you may want to assemble the following documents for your reference. You will also need to submit copies of these documents after you complete the online application. Documents will be accepted by secure email or secure fax only and must be submitted by Wednesday, July 26, 2023.

A supporting document cover sheet can be found inside the application.

- 2022 US Federal tax return (generally Form 1040 or 1040-NR) OR a formal tax extension (you will later need to provide the filed federal tax return)
- Schedule 1, which provides a summary of additional income and expenses from Schedule C (non-salary income) and Schedule E (rental or corporation income).
- Partner paystubs – two recent ones, or an offer letter
- Additional contracts or paystubs for any positions you or your spouse/partner anticipate continuing 7/1/2023-6/30/2024

14. Why do you need my federal tax forms?

Your federal tax forms verify both your children's status as tax dependents and your usual household income. Of course, incomes change year-to-year and there is a section that asks you to explain if your anticipated income will be over \$5,000 less than what was reported on your 2022 federal tax form.

If your child is not listed on your taxes, you will need to indicate whose taxes they are claimed on.

15. What is the program timeline?

Please remember that this cycle applies to all child care expenses incurred (care provided and paid for) during the current cycle from the July 1, 2023 through June 30, 2024.

Deadline Date	Description
July 12, 2023	Application opens in PeopleSoft > My Self-Service
July 26, 2023	Completed applications due (supporting documents and online submission) for those already employed before August 1, 2023
September 8, 2023	Completed applications due (supporting documents and online submission) for those hired on or after August 1, 2023 through early September, 2023.
July 27 – September 13, 2023	Verification and processing period (eligibility, income)
September 14, 2023	Award notification emailed with 'Instructions to Claim Award'
October 10, 2023	<u>Online claim form due</u> for any child care costs already paid for (or expected to be paid for) during this fiscal year (7/1/23-6/30/24).
October 20, 2023 (10/31 for monthly paychecks)	First quarter payment delivered via paycheck if claim form(s) submitted by the deadline. Payment is less required supplemental tax withholding (see #20 for more details) .

November 28, 2023	<u>Online claim form due for any additional child care costs for child care provided before 6/30/2024.</u>
December 21, 2023 (12/15 for monthly paychecks)	Second quarter payment delivered via paycheck if claim form(s) submitted by the deadline. Maximum payment is one half less required supplemental tax withholding (see #20).
March 5, 2024	<u>Online claim form due for any additional child care costs for child care provided before 6/30/2024.</u>
March 22, 2024 (3/29 for monthly paychecks)	Third quarter payment delivered via paycheck if claim form(s) submitted by the deadline. Maximum payment is three quarters less required supplemental tax withholding (see #20).
May 14, 2024	FINAL online claim form due for any remaining unclaimed child care costs for child care provided before 6/30/2024.
June 14, 2024 (6/28 for monthly paychecks)	Final payment delivered via paycheck if claim form(s) submitted by the deadline. Maximum payment is full award less required supplemental tax withholding (see #20).

If you do not submit an online claim form for your child care expenses by the first or second deadlines (for example, you may have missed the deadline OR you may not have started paying for child care yet) you DO NOT forfeit the funds. You will be able to submit unclaimed expenses by **May 14, 2024**. This is the **FINAL** deadline. Reminder emails are sent in early May.

16. When will I hear whether or not I have received an award?

Once applications are received and incomes are verified, you will receive notification via email in mid-September, 2023. Please see the timeline in #15.

17. What happens to my award if the actual cost of my childcare ends up being less than what I estimate on the application?

The child care scholarships program is a reimbursement program. You are only reimbursed for what you spend. If you spend less than what you were awarded, the program will reimburse you up to the total qualified child care costs you submitted. Please see #20 below for a detailed explanation of the reimbursement process with examples and the required tax withholding.

18. How much can I expect to receive as an award?

The following acts only as a guide as each year, the awards differ because of differences in applicants' financial needs.

Projected Gross Household Income: Adjusted for Family Size*	Base Award
< \$55,000	\$5,000 - \$7,500
\$55,000 - < \$75,000	\$4,000 - \$4,750
\$75,000 - < \$100,000	\$3,000 - \$3,800
\$100,000 - < \$130,000	\$2,000 - \$2,750
\$130,000 - < \$150,000	\$1,500 - \$1,900
>= \$150K	\$0

*The Adjusted Family Gross Income is found by subtracting from your family's gross income: (1) \$10,000 if you are a single-parent family, and (2) \$10,000 for each additional child after the first up to and including the fourth child aged under 13 years.

Part 3: Verifying Your Costs and Claiming Your Award Funds

19. How do I claim my child care expenses?

Full instructions for claiming your child care expenses are detailed in the award email. To summarize, child care expenses are documented and submitted in two ways:

1. Online claim form submission

Please log in to PeopleSoft through the HARVie homepage with your HarvardKey (hr.harvard.edu), click on the “My Self-Service” > “My Benefits” tiles, select the “Child Care Scholarship” tile, and select “Child Care Claims.” Enter in the required information and hit the “Save & Submit” button.

2. Completed and signed Provider Signature Form (attached to the award email or downloaded from the online claim form site – fillable pdf or printable form)

Please complete your section, hand/digitally sign it and either print the completed form or complete the remaining fillable fields and email the completed form to your provider for them to digitally sign or hand sign. Keep this for your records as it can be requested at any time for verification or clarification purposes.

In order to have a better idea of the costs of child care for Harvard faculty families, please make sure to enter ALL of your child care expenses online, even if they exceed your award amount. This is a requirement of the program; more complete data enables the Office of Work/Life to continually advocate for program enhancements.

20. How is the scholarship money disbursed?

The child care scholarship is a reimbursement program – you will only be reimbursed up to your award amount OR your total eligible child care costs if these are less than your award.

Once you have paid for your child care and have submitted an online claim form, funds are delivered to you via your paycheck according to the schedule outlined in #15. Program reimbursement payments are considered additional compensation according to IRS rules and are subject to federally-established required supplemental tax withholding (typically around 40%).

These awards are not grossed-up for tax purposes. Please see the following generalized examples:

Your award is \$2,000 and you submit one online claim expense of \$3,000 by the final deadline. It is approved and a payment of \$2,000 is sent to payroll for processing. Your net amount, provided after required supplemental tax withholding of about 40%, will be approximately \$1,200 in your paycheck.

Your award is \$2,000 and you submit one online claim expense of \$1,500 by the final deadline. It is approved and a payment of \$1,500 is sent to payroll for processing. Your net amount, provided after required supplemental tax withholding of about 40%, will be approximately \$900 in your paycheck. No more funds are reimbursed to you – you forfeit the unclaimed funds.

Your award is \$2,000 and you submit one online claim expense of \$2,000 by the first deadline. It is approved and a quarter payment of \$500 is sent to payroll for processing for each of the payroll deadlines shown above (#15). Your net amount, provided after

required supplemental tax withholding of about 40% in your paycheck, is approximately \$1200, disbursed \$300 at a time in each of the four paychecks.

21. When will I receive my reimbursement payments?

The program schedule is outlined in #15. If you submit your expenses online by the claim form deadlines and are paid weekly or biweekly, then you will receive up to four reimbursements on the following dates: October 20, 2023, December 15, 2023, March 22, 2024, and June 14, 2024. If you are paid monthly, then you will receive up to four reimbursements on the following dates: October 31, 2023, December 21, 2023, March 29, 2024, and June 28, 2024. If you only submit one claim by the FINAL deadline of May 14, 2024, then you will receive one reimbursement in your June paycheck for the whole award amount, or the total of your costs (whichever is the smaller value). Remember that the reimbursement is subject to required tax withholdings.

22. What if I have not yet spent any money on child care?

If you will not begin to incur child care expenses until a time later in the fiscal year (7/1/23 - 6/30/24), you can submit your first online claim after you begin incurring expenses. You will not forfeit any funds unless you do not submit an online claim form by the FINAL deadline of May 14, 2024.

23. What if I only have receipts or it is difficult for me to obtain signatures for the Provider Signature Form?

If you only have receipts for payments made, you can enter these online in lieu of a signed Provider Signature Form. Just keep the receipts for your records and note that we can request this information for clarification at any time. You will still need to sign the employee portion of the Provider Signature Form and complete the details of the Provider, attaching your payment receipts.

24. What if I use different Providers for my individual children?

Just use the fillable .pdf form, or print out as many Provider Signature Forms as you have caregivers, and enter these costs on separate lines in the online claim form on PeopleSoft.

25. What if I miss a claim deadline?

As long as you submit all of your claims by May 14, 2024, you will not lose any scholarship funds that have been awarded to you; you will simply delay the receipt of your funds. Payments cannot be made beyond the end of the fiscal year. You will forfeit any remaining unclaimed funds. An email reminder will be sent in early May, 2024.

26. Can I submit forms in advance of making payments?

Generally, you must submit claims after making payments. However, if you have an annual or periodic contract with your provider, you are welcome to claim for the whole academic/fiscal year or contract care period in advance to ensure that you do not miss payment deadlines. You will need to have your child care provider complete the Provider Signature Form for the whole year/period. You will still receive your payments based on the schedule outlined above in #15.

27. How do I submit my online claim forms?

Please log in to PeopleSoft through the HARVie homepage with your HarvardKey (hr.harvard.edu), click on the “My Self-Service” > “My Benefits” tiles, choose the “Child Care Scholarship” tile, and select “Child Care Scholarship Claims.” Complete the fields and add new claim lines as needed. Save and submit your entered claims before logging out.

28. What happens if I leave the University or my eligibility changes? Will I still be eligible to receive the award?

If, during the scholarship period, there is a change in your situation such that you no longer meet the eligibility criteria, the scholarship will be discontinued. Examples of a change in status include the termination of Harvard employment or the change to a job code/position that is no longer one which is part of the program (see #1 above). Pro-rated payments will be made in both cases.

29. Can I use the funds set aside in my Dependent Care FSA and the award from the child care scholarships together to pay for my child care?

Yes, the two programs complement one another and can be used together. The University-wide Childcare Scholarship provides you with additional income, and the FSA provides you with a way to protect part of your overall salary from taxes with a self-funded reserve that can be set aside for dependent care expenses. In both cases, you are submitting receipts to demonstrate that you have child care expenses, but in one case you are claiming extra income (and paying taxes on it at around 40%) and in the other you are claiming the tax protection that is available to you. The same receipts can be submitted to each program.

Additional Questions? Please email the Office of Work/Life: childcare_scholarships@harvard.edu.