

## SURROGACY ASSISTANCE PROGRAM

Yale University's surrogacy assistance program can support all paths to parenthood. Recognizing the unique challenges associated with surrogacy, Progyny assists in reviewing and administering Yale University's Surrogacy Assistance Program. Yale University will reimburse up to a \$10,000 lifetime maximum per employee of eligible surrogacy expenses. You will also have unlimited access to a dedicated Patient Care Advocate (PCA), who will provide you with information, resources, and emotional support throughout your surrogacy journey.

### Eligibility

- Eligible Employees are employees who meet the following criteria:
  - US domestic Faculty and Managerial and Professional (salaried) staff only
  - Working 20+ hours per week – salaried staff and minimum of 0.5 FTE – Faculty
  - Eligibility begins first of the month if date of hire or transfer to an eligible position is first of the month, otherwise, first of the month following date of hire.

### To Apply for Reimbursement:

1. Contact your Progyny Patient Care Advocate (PCA) at (866) 881-4029 and request assistance with the Surrogacy Reimbursement application.
2. Your Progyny Patient Care Advocate will review the reimbursement policy with you, noting eligible expenses may be submitted for reimbursement when your \$10,000 expense limit has been reached.
3. Once you are ready to request a reimbursement, submit your expense(s) for reimbursement, using the Progyny Attestation Form.
4. Progyny will review expenses and submit a report to Yale University's dedicated point-of-contact, including total reimbursable amounts, reimbursement categories, and the member's Employee ID (or similar identifier).
5. Yale University issues reimbursement to you in your next paycheck if administratively practicable but not later than the second paycheck following receipt of the Progyny report.

Progyny's eligible reimbursements include the following expenses, provided such expenses are incurred after an eligible employee's date of hire and are submitted within twelve months of incurring such

expense:<sup>1</sup>

## Surrogacy Eligible Expenses

- Surrogacy agency or legal fees<sup>2</sup>
  - Attorney fees for both intended parents and surrogate
  - Psych screening and home visit fees for surrogate
  - Psych screening and home visit fees for intended parent(s)
  - Court fees
  - Surrogate compensation
  - Surrogate escrow funds
  - Fees associated with the adoption of a child through a legally recognized surrogate arrangement
- IVF and medical costs related to surrogacy
  - Surrogate screening costs
  - Embryo(s) transfer costs
- Medical expenses related to a surrogate's pregnancy (which may include but are not limited to: surrogate's maternity insurance, surrogate's deductible, surrogate's co-insurance)
- Travel expenses for the intended parents or surrogate related to the surrogacy
- Consultant/specialist fees

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<sup>1</sup> Expenses incurred in pursuit of surrogacy that does not result in a successful live birth are eligible for reimbursement under this Surrogacy Assistance Program.

<sup>2</sup> Employee must provide copy of an executed surrogacy agreement or letter from an attorney to be considered eligible.

## The following expenses are not eligible for reimbursement:

- Expenses already paid for or reimbursed by another employer, benefit, program, or party
- Costs paid using funds received from any federal, state, or local program
- Expenses allowed as a credit or deduction under any federal income tax rule
- Surrogacy arrangements that are not legally recognized
- Any expenses that violate state or federal law
- Medical expenses related to an intended parent's pregnancy (must be billed to medical)
- Expenses not paid in US dollars

## Donor Eligible Expenses

- Donor agency, psych, and/or legal fees
  - Donor contract fees
  - Donor compensation
  - Donor medication
- Travel expenses for the intended parents or surrogate related to donor services
- Embryo donation fees including but not limited to admin, legal, and psych fees
- Consultant/specialist fees

## Donor Ineligible Expenses

- Expenses already paid for or reimbursed by another employer, benefit, program, or party
- Costs paid using funds received from any federal, state, or local program
- Expenses allowed as a credit or deduction under any federal income tax rule
- Donation arrangements that are not legally recognized

- Any expenses that violate state or federal law
- Medical expenses related to an intended parent's pregnancy (must be billed to medical)
- Expenses not paid in US dollars

## Tax Consequences

All benefits provided under this program are subject to applicable federal and state tax withholdings. For purposes of determining when the \$10,000 maximum lifetime benefit has been reached, the gross amount of the expense paid or reimbursed is used rather than the net amount after tax withholdings.