TUITION BENEFIT APPLICATION

DATE OF APPLICATION

_____/_____/_____

ACADEMIC TERM (Check One Only)

☐ Fall 20____ ☐ Spring 20____ ☐ Summer 20____

I. INSTRUCTIONS: Complete and submit form to The Office of Human Resources for each term of enrollment. Tuition benefits are granted only to full-time employees. Please refer to the policy or see backside of this application for more information regarding this benefit.

EMPLOYEE/STUDENT INFORMATION:

Employee Name	Datatel #	
Department	Full-time Employment Date	Relationship to Employee
Name of Student	Student's Datatel No.	Student's Birthdate (if child of employee)

II. CERTIFICATION: I hereby apply for The University of Tulsa Tuition Benefit. For tuition benefits for an eligible dependent child, I certify that the student named above is an eligible dependent as described on the reverse side of this form and the university's Tuition Benefit Policy;

III. AGREEMENT: Full-time employees who utilize the tuition assistance benefit for either themselves or their eligible dependents must remain an active employee for the entire semester in order to have the university pay the entire cost of this benefit. Employees, who terminate their employment prior to the end of the semester, will have their tuition benefit pro-rated accordingly for either themselves and/or their dependents.

By signing this form, I agree to have the remaining pro-rated portion of the tuition benefit deducted from my final paycheck. If a balance remains following the final payroll check, I agree to sign a promissory note agreeing to pay the remaining balance of the tuition cost. I understand that if I do not agree to sign a promissory note, I and/or my eligible dependents will be withdrawn, receiving no credit for the classes.

Employee's Signature	**Date**

CLASSIFICATION: (Check ONE of the three below.)

☐ UNDERGRADUATE: Number of Credit Hours enrolled this term: _____

☐ Freshman ☐ Sophomore ☐ Junior ☐ Senior ☐ Study Abroad ☐ Special_____

☐ GRADUATE SCHOOL*: Number of Credit Hours enrolled this term: _____
*Graduate Courses may be taxed based upon IRS Guidelines.

☐ LAW SCHOOL: Number of Credit Hours enrolled this term: _____

Is the above student presently receiving other scholarships? If so, please list.
Has the above student applied for other scholarships, grants, loans, or other financial assistance? If so, please list.
Is the above student eligible for veteran's educational benefits? Yes No

V. APPROVAL: If this application is for the enrollment of an employee, the immediate supervisor must approve it, or if enrolling in more than four credit hours it must also have the approval of the appropriate Vice President. These approvals must be obtained before an enrollment can be completed.

No. of Credit Hours Enrolled This Term	Approved By Supervisor	Approved By Vice President

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FOR UNIVERSITY USE

Employment Verified	Percentage of Tuition Reduction Authorized	
Approved (Personnel Officer)	Account No.	Amount

Revised 07/01/2007

TUITION BENEFIT APPLICATION

Please read the following information before completing the information on the reverse side of this Tuition Benefit Application. NOTICE: This application is for credit courses. *Courses offered through the Division of Continuing Education are not applicable for regular tuition reduction.*

Tuition Benefit Basics:
The amount of tuition benefit depends on the employee's length of service. Full-time employees, who are hired after the beginning of the semester, but prior to the Census Date, may enroll or have their eligible dependents enroll, in college credit courses at the university up to the Census Date. They will be eligible for 50% tuition reduction for classes taken. If an employee is hired after the Census Date, they or their eligible dependents will not be eligible for tuition benefits until the beginning of the following semester.
Based on an employee's anniversary date, after one year of service, full-time employees and their eligible dependents are entitled to 100% tuition benefits. For anniversary dates that fall after the start of a semester, employees and their eligible dependents will be eligible for 100% tuition benefits beginning the following semester.

Employee enrollment is normally limited to a maximum of **9 hours per semester**.
The tuition benefit is limited to the price of the course credit only. The employee, employee's spouse, and eligible dependent children may enroll for any course for credit *(excluding such areas as private music lessons)*. The tuition reduction benefit does not apply to non-credit courses and special programs *(such as speech and hearing clinic, University School, Child Development Center, EIIS, etc.)*. It does not cover textbooks or other associated fees.
Tuition reduction for employees' dependents cannot be combined with institutional financial aid. This means that during the first year of employment when an employee's dependent is entitled to a 50% tuition reduction and the dependent has also been awarded institutional aid, he or she may receive either the tuition reduction OR the institutional aid, but not both. During the second year of employment, the dependent is generally entitled to full tuition reduction based on the parent's date of hire and no institutional aid.
It is important to recognize that the value of the tuition reduction will be factored into the determination of the student's federal need in connection with any need-based aid that the student could receive.
Under the Internal Revenue Service Federal Tax Code, **Tuition benefits for undergraduate students are not taxable to the employee.**
Employees who terminate their employment prior to the end of the semester, will have their tuition benefit pro-rated accordingly for either themselves and/or their dependents. The terminated employee will be required to sign a promissory note agreeing to pay the remaining balance of the tuition cost. If the employee does not agree to sign this note, they and/or eligible dependents will be withdrawn, receiving no credit for the class(s).
The program provides a reduction of tuition at the undergraduate **or** graduate level. Both levels cannot be pursued under this program. The reduction is provided for the pursuit of you or your dependents first undergraduate or graduate degree. Second undergraduate or graduate degrees are not covered.

Eligibility:
Tuition discounts are available for full-time employees and their eligible dependents that are determined to be admissible through the undergraduate or graduate offices of admissions. An eligible dependent is defined as (1) your lawfully-married spouse based on Oklahoma's marriage laws (without looking at other state laws or rules) (2) your Domestic Partner based on criteria set forth by The University of Tulsa and/or (3) unmarried children up to and including the age of 24. Children include natural born children, adopted children, step-children who live with you more than half-time, or any child for whom you have legal custody.
Note: For employees with a current employment date prior to July 1, 2007, an eligible dependent child is defined as the employee's child who may be claimed on the employee's income taxes (by IRS guidelines). (See below section entitled "IRS Definitions".)
Tuition benefits are also available to spouses and eligible dependent children of totally disabled or deceased employees, who immediately preceding death or disability had been employed for five consecutive years at the University. Retirees and their eligible dependents are entitled to 100% tuition benefit for credit courses.

IRS Definitions (for dependent status): *Please refer to IRS guidelines for full details. This definition pertains only to those employees with a hired date prior to July 1, 2007.*
1. Relationship Test: Your child is your son, stepson, daughter, step-daughter, a legally adopted child, or a child who was placed with you by an authorized placement agency for your legal adoption.
2. Joint Return Test: Even if the other dependency tests are met, you are generally not allowed an exemption for your dependent if he or she files a joint return.
3. Gross Income Test: You may not take an exemption if the dependent person had a gross income in excess of IRS standards for the year. This does not apply if the person is your child and is either under age 19, or a full-time student under age 24.
4. Support Test: You must provide more than half of a person's total support during the calendar year to meet the support test. Total support includes amounts spent to provide food, lodging, clothing, education, medical and dental care, recreation, transportation, and similar necessities.

Supervisor's Approval:
If this application is for the enrollment of an employee, the immediate supervisor must approve it.
If the employee is enrolling in four or more credit hours, the appropriate Vice President must also approve it.
0-4 hours (one course) Supervisor's approval
5-9 hours Supervisor's approval and respective Vice President's approval