INDIANA UNIVERSITY

UHRS 04/2011

IU Tuition Benefit Enrollment Form

(formerly the IU Fee Courtesy Plan)

In order to avoid being billed for full tuition, employees are encouraged to submit this form well before the beginning of the academic year each fall. If this enrollment form is processed after the student is billed for tuition, the Tuition Benefit award becomes a reimbursement after the student has paid all tuition. If applying retroactively, enrollment forms cannot be accepted after December 31 of the year in which the academic year ended.

Employee Information:

Employee Name: _____ Employee ID: __ __ __ __ __ __ __ __ __ __

Address: _____ City: _____ State: _____ Zip: _____

Phone (Home): _____-_____-_____ Phone (Campus): _____-_____-_____ E-mail: _____

Recipient (check one): ☐ Employee ☐ Spouse (Marriage Date: _____) ☐ Registered Domestic Partner ☐ Dependent Child ☐ Dependent Child of Domestic Partner

Documentation to verify the relationship of a spouse, domestic partner, or dependent child (marriage certificate, birth certificate, domestic partner affidavit) is required with this enrollment form unless such documentation has been previously submitted. Please indicate their either you: ☐ are submitting documentation with this enrollment for **OR** ☐ have previously submitted such documentation to Human Resources

Student Information:

Student Name: _____ Student University ID: __ __ __ __ __ __ __ __ __ __

Address: _____ City: _____ State: _____ Zip: _____

Campus of Enrollment: _____ Name of Graduate Program*, if applicable: _____

***Kelley Direct MBA Program ONLY** (check all that apply): ☐ Fall 2010 Term ☐ Winter 2010 Term ☐ Spring 2011 Term ☐ Summer 2011 Term

I am applying for the IU Tuition Benefit for (check all that apply): ☐ Fall 2010 Semester ☐ Spring 2011 Semester ☐ Summer 2011 Semester

Only 1 form will need to be submitted per academic year.

Are you enrolling in Independent Study? (Note: This only includes courses through Continuing Studies; this does not include graduate level independent student research courses) ☐ Yes ☐ No

Complete the following for Dependent Child Tuition Benefit:

Will the dependent:

- graduate from high school before the above period(s)? ☐ Yes ☐ No
- complete a baccalaureate degree before the above period(s)? ☐ Yes ☐ No
- be married? ☐ Yes ☐ No
- meet the IRS Support Test and be claimed as a Federal Income Tax Dependent? ☐ Yes ☐ No

Birth Date of Dependent: _____/_____/_____ Dependent's Age: _____

Student and Employee Affirmations:

Student Affirmation. By signing and dating this form, I affirm that all information submitted as a part of, and in support of, this application is complete and correct. I further acknowledge that the Tuition Benefit may be reduced or canceled should my eligibility change. I agree to pay all IU credit hour fees that are not covered by the Tuition Benefit program. I understand that the Tuition Benefit that I am receiving is through an eligible Indiana University employee and, for the purposes of implementation of this benefit, I authorize Indiana University to issue periodic notices of the number of credit hours I have earned to the Indiana University employee through whom I am receiving this benefit.

STUDENT SIGNATURE: _____ DATE: _____/_____/_____

Employee Affirmation. By signing and dating this form, I affirm that all information submitted as a part of, and in support of, this application is complete and correct, including the student information section of the application, and understand that a false declaration may result in disciplinary action up to and including termination of employment at Indiana University. If I am found to be ineligible for any Tuition Benefit that I have received, I agree to pay the amount of fees owed to the University. I expressly consent to the withdrawal or deduction from my paycheck of the amount of fees for which I have been found ineligible for Tuition Benefit and which I have not paid within the timeframe specified by the Office of the Bursar.

EMPLOYEE SIGNATURE: _____ DATE: _____/_____/_____

Please read information BEFORE completing the application form on the reverse side.

Eligibility

Employee Tuition Benefit
By the end of the first week of classes for the semester or first summer session, the employee must be one of the following:

- A full-time Staff or Faculty member at Indiana University;
- A former employee with retiree status;
- An employee receiving long-term disability benefits.

Dependent Child Tuition Benefit
On the first day of the session, the recipient of Dependent Child Tuition Benefit:

- must be a dependent child or step-child of an eligible employee, a child or step-child of a registered domestic partner or a child whose legal guardian is an eligible employee or employee's spouse, 2) age 23 or under, 3) must be unmarried, and 4) must meet the IRS support test requirements as a dependent of the employee, spouse, or registered same-sex domestic partner.
- must be a dependent child of a deceased employee who was eligible at the time of death, and on the first day of the semester or session, meets the conditions above.

Spouse Tuition Benefit
On the first day of the session, the recipient of Spouse/Registered Domestic Partner Tuition Benefit:

- must be a legal spouse/registered domestic partner or a spouse/registered domestic partner of a deceased employee who was previously eligible.

Questions regarding IU employment eligibility should be directed to your campus Human Resources office.

Forms Required and Priority Dates

- IU Tuition Benefit Enrollment Forms are to be submitted by mail to the University Human Resouce Services office at Poplars E165, 400 E. 7th Street, Bloomington, IN 47405 or by fax to (812) 855-3409.
- A former employee with retiree status;
- An employee receiving long-term disability benefits.
- Tuition Benefit is not automatically renewable.
- To print an enrollment form and complete it manually, go to http://hr.iu.edu/benefits/tuition.html.
- To submit the form online go to https://webdb.iu.edu/BenefitEnrollment/secure/home.cfm. Once the online form has been received by our office, it will be reviewed for approval.
- In order to avoid being billed for full tuition, employees are encouraged to submit this form well before the beginning of the academic year each fall.
- If applying retroactively, enrollment forms cannot be accepted after December 31 of the year in which the academic year ended.

To ensure Tuition Benefit toward fee payment, students must return the IU Tuition Benefit Enrollment Form to the Bloomington Human Resources office as soon as possible. If this enrollment form is processed after the student has been billed for tuition, the Tuition Benefit award becomes a reimbursement after the student has paid all fees. If applying for Tuition Benefit retroactively, enrollment forms cannot be accepted after December 31st of the year in which the academic year ended.

Separate applications for Tuition Benefit are required for employees applying for benefits under more than one of the Tuition Benefit coverages (i.e. Employee Tuition Benefit, Spouse/Registered Domestic Partner Tuition Benefit, and Dependent Child Tuition Benefit).

Employees are responsible for being aware of all eligibility requirements and application procedures. Any person who knowingly makes a false statement or a misrepresentation of information pertaining to the Tuition Benefit application shall be (1) subject to cancellation of further Tuition Benefit, and (2) liable for repayment of Tuition Benefit received.

Forms Required and Priority Dates

Employee & Spouse Tuition Benefit
For employees, retirees, spouses and registered domestic partners the Tuition Benefit value is 100% of covered tuition up to a dollar limit based on the Indiana resident per credit hour rates at each campus, and, in the case of employees, on class standing (undergraduate, graduate, or professional*). Covered tuition does include audit hours and independent study. Independent study will be administered as a reimbursement after the course has been completed.

Dependent Child Tuition Benefit
Dependent Child Tuition Benefit is a subsidy of 50% of the Indiana resident undergraduate rate, for a maximum of the first 140 credit hours (which includes any transfer hours) toward the first bachelor's degree as long as they meet the dependent child requirements as listed in the policy. Tuition Benefit will apply to independent study; however it will be administered as a reimbursement after the course has been completed. Tuition Benefit does not apply to audit hours.

- Covered tuition does not include special fees, such as those for laboratories, applied music, student teaching, education early experience, dissertation research fee (G901 and B798), or rental of special equipment and facilities.
- The Registrar's Office will assess non-resident fees for those employees who do not meet Indiana residency requirements.
- Questions regarding the exact value of Tuition Benefit awards should be referred to the Office of the Bursar on the campus where student will be enrolled.
- Tuition Benefit is not a cash award; rather, it is an employee benefit that pays a portion of the credit-hour fees, and in some cases, audit fees.
- Tuition Benefit awards are reduced or canceled if the student's or employee's eligibility ceases.
- Any changes in the student's enrollment may also result in changes to the amount of Tuition Benefit. Then the Office of the Bursar will bill the student for applicable fees.
- Tuition Benefit for graduate level courses is treated as taxable income under 1996 Federal legislation. In accordance with IRS regulations, these taxes will be withheld from the employee's pay. The employee's pay notice will include reference to the amount of Tuition Benefit included as taxable income.

The dollar limits for each campus can be found at
http://hr.iu.edu/benefits/tuition.html.

(* An example of professional class standing would be the Law Program.)