



## APPLICATION FOR TUITION REMISSION

### **SECTION I – GUIDELINES FOR AWARDS**

1. Benefit funding is for tuition only (student/employee is responsible for fees, books, housing, etc.).
2. The benefit recipient (employee/dependent\*/spouse) must complete the need-based financial aid process (FAFSA, IDF), before receiving tuition remission, if the following conditions apply:
  - a. the student is accepted into a degree or certificate, *undergraduate* program of study
  - b. the student enrolls for at least 6 credits in any given semester
  - c. the student *does not* have an earned bachelor degree
3. If required to file, the FAFSA/IDF must be submitted by March 15<sup>th</sup> of the spring semester preceding the corresponding academic year (i.e. March 15, 2011 for the 2011-12 school year).
4. The benefit recipient will be responsible for any interest charges that accrue on their account due to late application.
5. Employee dependents must meet the IRS definition of a “legal dependent”. Proof of dependency (copy of employee tax return) may be required.
6. **The value of tuition remission for graduate education is considered taxable income. The taxable income will be included in the employee payroll at the end of the academic term for which tuition remission is awarded and will be subject to federal and state taxes.**
7. Refer to ***Personnel Policies, Administrative Procedures, and Regulations Handbook*** for detailed eligibility information ([www.viterbo.edu/hr](http://www.viterbo.edu/hr)).

***Return this form to the office of Human Resources  
Murphy Center – Room 200***

### **SECTION II -EMPLOYEE INFORMATION**

Employee Name: \_\_\_\_\_ Datatel Id or SSN: \_\_\_\_\_

I am seeking tuition remission for my dependent or spouse \_\_\_\_ (If “Yes”, skip to SECTION III. If “No”, continue with items in this SECTION – you must also provide your signature in SECTION IV)

Do you currently have an earned Bachelor’s Degree? \_\_\_\_ Yes \_\_\_\_ No

Indicate below the term(s) for which tuition remission is requested for ***yourself*** by specifying the total number of credits to be taken in each term:

Fall 20\_\_\_\_: # of credits \_\_\_\_ Spring 20\_\_\_\_: # of credits \_\_\_\_ Summer 20\_\_\_\_: # of credits \_\_\_\_

### **SECTION III – DEPENDENT/SPOUSE INFORMATION**

Dependent/Spouse Name: \_\_\_\_\_ Datatel Id or SSN: \_\_\_\_\_

Relationship to Employee: \_\_\_\_ Dependent \_\_\_\_ Spouse

Does this person currently have an earned Bachelor’s Degree? \_\_\_\_ Yes \_\_\_\_ No

Indicate below the term(s) for which tuition remission is requested for the dependent/spouse by specifying the total number of credits to be taken in each term:

Fall 20\_\_\_\_: # of credits \_\_\_\_ Spring 20\_\_\_\_: # of credits \_\_\_\_ (Tuition remission is not available to dependents or spouses during summer sessions)

### **SECTION IV – EMPLOYEE SIGNATURE**

The information reported on this form is true and complete. I agree to notify the Financial Aid Office of any changes to program, credit load, and/or employment status.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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## HUMAN RESOURCE OFFICE USE ONLY

Employee start date: \_\_\_\_\_ Department: \_\_\_\_\_

Employee is: \_\_\_\_\_ Administration \_\_\_\_\_ Faculty \_\_\_\_\_ Staff

Employee is \_\_\_\_\_ Full time \_\_\_\_\_ Part time

I certify that the following are eligible for tuition remission:

\_\_\_\_\_ Employee \_\_\_\_\_ Dependent/Spouse

Benefit Rate:

\_\_\_\_\_ Full time Rate \_\_\_\_\_ Part time Rate

Limitations/Restrictions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

HR Director Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## FINANCIAL AID OFFICE USE ONLY

FAFSA Required \_\_\_\_\_ YES \_\_\_\_\_ NO (Reason: \_\_\_\_\_ BA/BS \_\_\_\_\_ Special \_\_\_\_\_ < ½ time \_\_\_\_\_ other: \_\_\_\_\_)

Fall amount \$ \_\_\_\_\_ Spring amount \$ \_\_\_\_\_ Summer amount \$ \_\_\_\_\_

Processed by: \_\_\_\_\_ Date: \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_