

UNIVERSITY OF ROCHESTER
TUITION BENEFITS PLAN FOR SPOUSES/DOMESTIC PARTNERS
OF FACULTY AND STAFF

Questions regarding the Tuition Benefits Plan should be directed to the Benefits Office at 585.275.7013

**Instructions for Application and Waiver Procedure
for Credit Courses Taken at the University of Rochester (and Eastman Community Music School)**

Tuition Waiver Procedure

Step # 1 Employee and Spouse/Domestic Partner:

- Completes Application for Tuition Waiver (one application per individual for each term)
 - Completes Employee Section
 - Lists all courses for which a tuition waiver is requested
 - Employee and spouse/domestic partner sign application
- Keeps cover sheet with instructions for application and waiver procedure
- Employee returns completed application to Tuition Benefits Office at Brooks Landing, Box 278955
- Spouses/Qualified Domestic Partners who are matriculated and intend to apply for financial aid need to contact the Financial Aid Office as soon as possible.

It is recommended that applications be completed and approved prior to the start of the course. **(Completed application must be received by the Benefits Office no later than 30 days after the start of the course[s]. Retroactive requests will not be approved.)**

Step # 2 Spouse/Qualified Domestic Partner:

- Registers for course(s)

Step # 3 Benefits Office:

- Confirms eligibility, authorizes the application for tuition waiver for each applicable benefit level, and forwards waiver to Financial Aid Office for calculation of tuition benefits for each level approved by the Benefits Office.

Step # 4 Financial Aid Office:

- Calculates the amount of the tuition benefit based upon the benefit level approved by the Benefits Office
- Sends the employee a copy of the award letter with the applicable benefit amounts calculated
- Credits the spouse's/domestic partner's student account by the greatest dollar benefit, unless otherwise notified by employee
- Sends copy of waiver with applicable benefits tuition amount calculated to the Tuition Benefits Office at Brooks Landing, Box 278955

Tuition Waiver Information

- **Tuition benefits provided by the University for graduate courses taken by spouses are considered taxable.** Applicable Federal and State income taxes and FICA taxes (*approximately 42.42% of the tuition amount*) will be deducted from the employee's paycheck when the waiver is approved and the taxable income will be reflected on his/her W-2 for the calendar year when the actual tuition credit is posted to his/her spouse's account.
- **Tuition benefits provided by the University for domestic partners are considered taxable.** Applicable Federal and State income taxes and FICA taxes (*approximately 42.42% of the tuition amount*) will be deducted from the employee's paycheck when the waiver is approved and the taxable income will be reflected on his/her W-2 for the calendar year when the actual tuition credit is posted to his/her domestic partner's account. If applying for tuition benefits for a qualified domestic partner, the employee must contact the Benefits Office to complete the Application for Domestic Partnership.

(Calculation example: Total yearly tuition = \$19,980 x 42.42% = **\$8,475.52**—estimated amount that will be **deducted from the employee's paycheck** during the calendar year)

- Tuition benefits are provided for credit-bearing courses only. Cost of supplies, textbooks and the like will not be covered. Courses taken on an audit basis will not be covered.
- The tuition benefit for a spouse/domestic partner is available only while the employee is employed by the University and meets the applicable requirements. Should employment cease (or eligibility otherwise cease) during an academic year, the benefit will be prorated for the course of that year.
- Grandparenting of Tuition Benefits
 - Full-time faculty and staff employed prior to 1/1/96, who are adversely affected either by the eligibility change from one to two years or by the change in aggregate benefit will also be allowed to elect to participate under the previous University of Rochester Tuition Benefit Plan for spouses. Previously, spouses of full-time faculty and staff with one year of service were eligible to receive 50% waiver of tuition for unlimited credit courses at the University of Rochester.
 - Part-time staff employed prior to 1/1/96, who are adversely affected by the eligibility change from two to three years or by the change in aggregate benefit can elect to participate under the previous University of Rochester Tuition Benefit Plan for spouses for spousal undergraduate and graduate education that commenced by the end of calendar year 1999. Previously, spouses of part-time staff with two years of service were eligible to receive 50% waiver of tuition for unlimited credit courses at the University of Rochester.

**APPLICATION FOR SPOUSAL/QUALIFIED DOMESTIC PARTNER
TUITION WAIVER FOR COURSES TAKEN AT THE U of R**

Application should be completed prior to registration

(Before completing application, please read cover sheet for instructions and important information)

EMPLOYEE SECTION

Employee Name* _____ University Telephone _____
 Division/Department _____ Work Status Full-time Part-time
 Intramural Address _____ Job Title _____
 Employee ID #* _____
 Spouse/Qualified Domestic Partner Name _____ Student ID* _____

*Required to process this application

FALL WINTER SPRING SUMMER Starting _____ Ending _____
 (Check one semester only) (month/year) (month/year)

School/College	CRN	Course #	and Title	Credit Hours	Graduate Level Course (Yes/No)
1. _____					<input type="checkbox"/> Yes <input type="checkbox"/> No
2. _____					<input type="checkbox"/> Yes <input type="checkbox"/> No
3. _____					<input type="checkbox"/> Yes <input type="checkbox"/> No
4. _____					<input type="checkbox"/> Yes <input type="checkbox"/> No

Signature of Employee _____ Date _____ Signature of Spouse/Qualified Domestic Partner _____ Date _____

Do you intend to apply for financial aid? Yes No

FINANCIAL AID OFFICE USE ONLY

Calculation of Tuition Benefit for each level checked

- _____ a) 50% of the stated full tuition cost at the applicable University of Rochester school or college for a spouse/domestic partner enrolled at the University, foregoing any other institutional scholarship or grant aid, whether need-based, Community Grant, Meliora or other scholarship/grant programs (with the exception of merit awards).
 Benefit Amount Per Semester: \$ _____
- _____ b) 25% of the difference between (i) the stated full tuition cost at the applicable University of Rochester school or college for a spouse/domestic partner enrolled at the University and (ii) the total need-based scholarship and need-based grant aid provided from all sources to that spouse/domestic partner, again foregoing any other institutional scholarship or grant aid, such as Community Grant, Meliora or other such scholarship/grant programs (with the exception of merit awards), with the 25% difference "blinded" from University need-based aid decisions.
 Benefit Amount Per Semester: \$ _____
- _____ c) 50% waiver of tuition for courses at the University of Rochester – available only to full-time faculty/staff and part-time staff employed prior to 1/1/96.
 Benefit Amount Per Semester: \$ _____

Financial Aid Approval _____ Date _____
 for Tuition Benefit Amount per Semester

BENEFITS OFFICE USE ONLY

Signature of Human Resource Representative _____ Date _____ Approval for Applicable Tuition Benefit Level

- _____ 2-17130-4825 25% Eastman Community Music
 _____ 1-17130-4821-F421 Spouse/Dom Ptr. Undergrad
 _____ 2-17130-4823-F420/FC02 Spouse/Dom. Ptr. Grad-Taxable