

UNIVERSITY OF ROCHESTER
TUITION BENEFITS PLAN FOR SPOUSES OF FACULTY AND STAFF

Instructions for Application and Waiver Procedure
for Credit Courses Taken at the University of Rochester

Tuition Waiver Procedure

Step # 1 Employee and Spouse:

- 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 sign application
- Keeps cover sheet with instructions for application and waiver procedure
- Employee returns completed application to the Benefits Office (Medical Center, G-8011, Box 636)
- Spouses who are matriculated and intend to apply for financial aid need to contact the Financial Aid Office as soon as possible.

**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:

- 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 checked.

Step # 4 Financial Aid Office:

- Calculates tuition benefits for each level approved by the Benefits Office
- Sends the employee a copy of the waiver with the applicable benefit amounts calculated
- Credits the spouse's student account by the greatest dollar benefit, unless otherwise notified by employee
- Sends copy of waiver with applicable benefits level calculated to the Benefits Office

Tuition Waiver Information

- Eligibility:
 - Full-time faculty/staff: service requirement is 2 years.
(The 2 years' full-time service requirement can be met by employment at the University or another higher education institution)
 - Part-time staff: service requirement is 3 years.
(The 3 years' full-time service requirement can be met by employment at the University or another higher education institution)
Part-time faculty and senior staff in salary grades 58 and above are not eligible for tuition benefits.
- Tuition benefits are provided for credit-bearing courses only. Audits will not be covered.
- Tuition benefits for graduate courses taken by spouses are considered taxable. The amount of the benefit will be added to the employee's annual income at the end of the year.
- Cost of supplies, textbooks and the like will not be covered.
- The tuition benefit for a spouse 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 pro-rated 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 1 to 2 years or by the change in aggregate benefit will also be allowed to elect to participate under the previous Rochester benefit plan for spouses. Previously, spouses of full-time faculty and staff with 1 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 2 to 3 years or by the change in aggregate benefit can elect to participate under the previous Rochester benefit plan for spouses. Previously, spouses of part-time staff with 2 years of service were eligible to receive 50% waiver of tuition for unlimited credit courses at the University of Rochester.
- Questions regarding the Tuition Benefits Plan should be directed to the Benefits Office at 275-7013.

**APPLICATION FOR SPOUSAL TUITION WAIVER
FOR COURSES TAKEN AT THE U of R**

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

EMPLOYEE SECTION

Employee Name _____ University Telephone _____
 Division/Department _____ Work Status Full-time Part-time
 Intramural Address _____ Job Title _____
 Employee ID # _____ Employee Social Security # _____
 Spouse Name _____ Spouse Social Security # _____

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

School/College	CRN	Course # and Title	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 _____ 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 enrolled at the University, foregoing any other institutional scholarship or grant aid, whether need-based, Community Grant, Meliora, merit, or other scholarship/grant programs.

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 enrolled at the University and (ii) the total need-based scholarship and need-based grant aid provided from all sources to that spouse, again foregoing any other institutional scholarship or grant aid, such as Community Grant, Meliora, merit, or other such scholarship/grant programs, with 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

Benefits Office Authorization _____ Date _____

Approval for Applicable Tuition Benefit Level

7/99

_____ 2-17130-4825
 _____ 1-17130-4821-F421
 _____ 2-17130-4823-F420/FC02

25% ESM Community Ed
 Spouse Undergrad
 Spouse Grad-Taxable