

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

Questions regarding the Tuition Benefits Plan should be directed to the Benefits Office @ 275-7013

**Instructions for Application and Waiver Procedure**  
**For Credit Courses Taken at the University of Rochester and Musical Instruction at the Eastman Community Music School**

**Tuition Waiver Procedure**

**Step # 1 Employee and Spouse:**

- ♦ Complete 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 Tuition Benefits Office at Brooks Landing, Box 278955
- ♦ Spouses 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:**

- ♦ 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 benefit 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 student account by the greatest dollar benefit, unless otherwise notified by employee
- ♦ Sends copy of waiver with applicable benefits tuition amount calculated to 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 40.32% 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 their W-2 for the calendar year when the actual tuition credit is posted to their spouse's account.

**(Calculation example:** Total yearly tuition = \$19,980 x 40.32% = **\$8,055.94**-estimated amount that will be **deducted from the employee's paycheck(s)** 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 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 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 SPOUSE 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**

\*Name \_\_\_\_\_ University Telephone \_\_\_\_\_  
 Division/Department \_\_\_\_\_ Work Status \_\_\_\_\_ Full-time \_\_\_\_\_ Part-Time  
 Intramural Address \_\_\_\_\_ Job Title \_\_\_\_\_  
 \*Employee ID \_\_\_\_\_

Spouse 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. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

\_\_\_\_\_  
**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 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 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 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

**OFFICE OF HUMAN RESOURCES USE ONLY**

\_\_\_\_\_  
 Signature of Human Resources Representative Date

Approval for Applicable Tuition Benefit Level

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