UNIVERSITY OF ROCHESTER TUITION BENEFITS PLAN
FOR GRANDFATHERED SPOUSES/DOMESTIC PARTNERS 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 Grandfathered Spouse/Domestic partner:**
- Complete Application for Tuition Waiver (one application per individual for each term)
- Completes Employee Section
- Employee and grandfathered spouse/domestic partner sign application
- Keeps cover sheet with instructions for application and waiver procedure
- Employee returns completed application to Office of Human Resources. It is recommended that applications be completed and approved prior to the start of the course. *(Completed application must be received by the Office of Human Resources no later than 30 days after the start of the course(s). Retroactive requests will not be approved.)*
- Grandfathered spouses/domestic partners who are matriculated and intend to apply for financial aid need to contact the Financial Aid Office as soon as possible.

**Step # 2 Office of Human Resources:**
- 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 Office of Human Resources

**Step # 3 Financial Aid Office:**
- Calculates the amount of the tuition benefit based upon the benefit level approved by the Office of Human Resources
- Sends the employee a copy of the award letter with the applicable benefit amounts calculated
- Credits the grandfathered 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 Office of Human Resources

**Tuition Waiver Information**

- **Tuition benefits provided by the University for graduate courses taken by grandfathered spouses are considered taxable.** Applicable Federal and State income taxes and FICA taxes *(approximately 42.27% of the taxable 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 grandfathered spouse’s account.

- **Tuition benefits provided by the University for undergraduate and graduate courses taken by grandfathered domestic partners are considered taxable.** Applicable Federal and State income taxes and FICA taxes *(approximately 42.27% of the taxable 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 grandfathered domestic partner’s account.

- **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 grandfathered 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 pro-rated for the course of that year.

**Grandfathering of Tuition Benefits**

- **Spouses/Domestic Partners of regular full-time faculty/staff who are receiving tuition benefits for and matriculated into a program no later than SUMMER 2013 semester/quarter will be eligible to continue to receive their current level of benefit [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 or otherwise such scholarship/grant programs (with the exception of merit awards) or 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 or other such scholarship/grant programs (with the exception of merit awards), with the 25% difference “blinded” from University need-based aid decisions] through completion of their degree or the end of the Spring 2017 semester, whichever comes first (matriculation must be maintained throughout the grandfathering period).

- **Spouses/Domestic Partners of regular part-time staff who are receiving tuition benefits for and matriculated into a program no later than SUMMER 2013 semester/quarter will be eligible to continue to receive their current level of benefit [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 or other such scholarship/grant programs (with the exception of merit awards), with the 25% difference “blinded” from University need-based aid decisions] through completion of their degree or the end of the Spring 2017 semester, whichever comes first (matriculation must be maintained throughout the grandfathering period).
APPLICATION FOR GRANDFATHERED SPOUSE/DOMESTIC PARTNER TUITION WAIVER
FOR COURSES TAKEN AT THE U of R*

(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 ________________________________
Grandfathered Spouse/Domestic partner Name____________________________ *Student ID ________________________________
☐ Spouse ☐ Domestic Partner

*Required to process this application

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 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 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: $________________

GRANDFATHERING CERTIFICATION

I hereby request that my above named spouse/domestic partner be grandfathered into the prior to Fall 2013 spouse/domestic partner tuition waiver benefit (see “Grandfathering of Tuition Benefits” on cover sheet) through completion of his/her degree or the end of the Spring 2017 semester, whichever comes first. I certify that my spouse/domestic partner has been receiving tuition benefits for and matriculated into a program no later than SUMMER 2013 semester/quarter.

Signature of Employee __________________________ Date __________ Signature of Grandfathered Spouse/Domestic partner __________________________ Date __________

OFFICE OF HUMAN RESOURCES USE ONLY

Approval for Applicable Tuition Benefit Level

--- 2-17130-4825 25% Eastman Community Music
--- 2-17130-4821-F421 Spouse/Domestic partner Undergrad
--- 2-17130-4823-F420/FC02 Spouse/Domestic partner Grad-Taxable

Office of Human Resources Authorization __________________________ Date __________

*Completed application can be submitted to the Office of Human Resources (Brooks Landing location) by:

- Email: lori.paradiso@rochester.edu
- Fax: 585-276-2783

Inter-office mail: P.O. Box 278955

Regular mail: 910 Genesee St., Suite 100

Rochester, NY 14627