

# IU Tuition Benefit Enrollment Form

In order to avoid being billed for full tuition, employees are encouraged to submit this form well before the beginning of the academic year each fall. If this enrollment form is processed after the student is billed for tuition, the Tuition Benefit award becomes a reimbursement after the student has paid all tuition. If applying retroactively, enrollment forms cannot be accepted after October 1st of the year in which the academic year ended.

## Employee Information:

Employee Name: \_\_\_\_\_ Employee ID: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone (Home): \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Phone (Campus): \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ E-mail: \_\_\_\_\_

## Student Information:

Student Name: \_\_\_\_\_ Student University ID: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Recipient:  Employee  Resident  Spouse (Marriage Date: \_\_\_\_\_)  Dependent Child

Please Note: Documentation to verify the relationship of a spouse or dependent child (marriage certificate, birth certificate, guardianship order) is required with this enrollment form unless such documentation has been previously submitted.

Campus of Enrollment: *(Select only 1 location, if attending multiple campuses please complete a separate form for each campus)*

Bloomington  IUPUI  Columbus  Fort Wayne  East  Kokomo  Northwest  South Bend  Southeast

I am applying for the IU Tuition Benefit for: *(Check all that apply)*

Fall 2016  Spring 2017  Summer 2017

Degree Program:

Undergraduate  Graduate  Graduate - SPEA Connect  Graduate - Kelley Direct  
 Advance College Project (ACP)  Graduate - Law School  Graduate - Business of Medicine  Graduate - Kelley School of Business

For Dependent Child Tuition Benefit: Birth Date of Dependent Child: \_\_\_\_/\_\_\_\_/\_\_\_\_ Age of Dependent Child: \_\_\_\_\_

Will the Dependent Child:

- graduate from high school before the above period(s)?  Yes  No
- complete a baccalaureate degree before the above period(s)?  Yes  No
- be married?  Yes  No
- meet the IRS Support Test requirements as a Qualifying Child?  Yes  No

## Student and Employee Affirmations:

**Student Affirmation.** By signing and dating this form, I affirm that all information submitted as a part of, and in support of, this application is complete and correct. I further acknowledge that the Tuition Benefit may be reduced or canceled should my eligibility change. I agree to pay all IU credit hour fees that are not covered by the Tuition Benefit program. I understand that the Tuition Benefit that I am receiving is through an eligible Indiana University employee and, for the purposes of implementation of this benefit, I authorize Indiana University to issue periodic notices of the number of credit hours I have earned to the Indiana University employee through whom I am receiving this benefit.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Employee Affirmation.** By signing and dating this form, I affirm that all information submitted as a part of, and in support of, this application is complete and correct, including the student information section of the application, and understand that a false declaration may result in disciplinary action up to and including termination of employment at Indiana University. If I am found to be ineligible for any Tuition Benefit that I have received, I agree to pay the amount of fees owed to the University. I expressly consent to the withdrawal or deduction from my paycheck of the amount of fees for which I have been found ineligible for Tuition Benefit and which I have not paid within the timeframe specified by the Office of the Bursar.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

### SUBMIT COMPLETED APPLICATION TO:

ATTN: Tuition Benefit, University Human Resources, Indiana University,  
400 East Seventh Street, Poplars E165, Bloomington, Indiana 47405  
Fax: (812) 855-3409, or scan and submit to [enews@iu.edu](mailto:enews@iu.edu).

## ***Please read information BEFORE completing the application form.***

Employees are responsible for being aware of all eligibility requirements and application procedures. Any person who knowingly makes a false statement or a misrepresentation of information pertaining to the Tuition Benefit application shall be (1) subject to cancellation of further Tuition Benefit, and (2) liable for repayment of Tuition Benefit received.

### **IU Tuition Benefit Plan Eligibility**

**Employee and Retiree Eligibility** - By the end of the first week of classes for the semester/term, the following categories of individuals associated with Indiana University are eligible for the Tuition Benefit:

- Full-time (75% FTE or greater) IU Academic and Staff Employees;
- Full-time (75% FTE or greater) IU Academic and Staff Employees on an approved leave of absence, other than a leave without pay prior to active employment.
- Former employees with IU Retiree status.
- Disabled former full-time (75% FTE or greater) IU Academic and Staff employees receiving long-term disability benefits from a University-sponsored plan, Social Security Administration, or PERF.

**Spouse Eligibility** - A spouse means one by marriage, either opposite-sex or same-sex, legally entered into in one of the 50 states, the District of Columbia, or a U.S. territory or a foreign country.

In order to be eligible for the IU Tuition Benefit, by the first day of the semester or term, the spouse must meet the definition of a spouse of an eligible employee or Retiree, or of a deceased employee or Retiree who was eligible at the time of their death.

**Dependent Child Eligibility** - A Dependent Child is defined as the biological or adopted child, stepchild, or child whose legal guardian is an eligible individual. The child must also:

- Be unmarried; and
- Be 23 years of age or under, and
- Meet the IRS Support test requirements as a Qualifying Child of the employee or spouse.

In order to be eligible for the IU Tuition Benefit, by the first day of the semester or term, the dependent child must meet the definition of a Dependent Child, as defined by the Plan, of an eligible employee or Retiree, or of a deceased employee or Retiree who was eligible at the time of their death.

### **IU Tuition Benefit Plan Coverages**

**Employee & IU Retiree Tuition Benefit** - is a subsidy of covered tuition up to a benefit dollar maximum per semester/term based on the Indiana resident per-credit-hour rates at each campus, and in the case of some employees/retirees, on class standing (undergraduate, graduate, or professional). Covered tuition can include audit hours.

**Spouse Benefit** - is a subsidy of covered tuition up to a benefit dollar maximum per semester/term based on the Indiana resident undergraduate rate at each campus. Covered tuition can include audit hours.

**Dependent Child Benefit** - is a subsidy of 50% of the Indiana resident undergraduate rate, up to the completion of a bachelor's degree or up to a maximum of 140 credit hours of IU Tuition Benefit awards, whichever comes first, as long as they meet the dependent child requirements as listed in the policy. For dependent children, Tuition Benefit does not apply to audit hours. The Tuition Benefit can be applied toward multiple campuses of attendance each semester/term.

**Benefit Amount(s)** - Applicable benefit maximums for each academic semester/term are available on the subsidy rates web page <http://hr.iu.edu/benefits/tuition-ratetable.htm>. All Summer sessions combined are considered as one semester.

### **IU Tuition Benefit Plan Provisions**

**Exclusions** - Covered tuition includes the per-credit-hour tuition rate charged to a student, excluding special fees, such as those for music performance studies, student teaching, laboratories, early education experience, dissertation advanced research (G901, B798, G831, or equivalent), rental of special equipment or facilities, and fees for non-credit courses. Mandatory student fees, such as student technology, activity, or athletic fees are not considered tuition and are not covered under this plan. Covered individuals are responsible for all tuition costs over the benefit maximum and excluded fees.

**Dual Eligibility** - Individuals are not eligible to receive benefits as both an employee and as a dependent of another employee or as a dependent of more than one employee.

**Quarter Term Schedule** - For employees and IU Retirees, the tuition benefit subsidy is equal to the annual benefit maximum (3 semesters) at the Business Graduate Rate listed in the rate section divided over four terms instead of three semesters.

**Registration for courses during work hours** - Employees who wish to enroll in University classes scheduled during normal work hours must obtain advance approval from the associated Department Head. See the applicable Training and Education personnel policy for provisions about covering time away from the job.

**Course Registration/Enrollment changes** - The Tuition Benefit award can be increased, reduced or canceled if the student's enrollment changes result in changes to the amount of the tuition benefit award eligibility. The Office of the Bursar will alter the student's bursar account accordingly.

**Advanced College Project (ACP) Courses** - The Tuition Benefit (a subsidy of 50% of the tuition) is applicable to Advanced College Project (ACP) courses. To receive the Tuition Benefit, the parent of the student must complete the IU Tuition Benefit Application, either online or by paper. Additional information about ACP can be found at <http://acp.indiana.edu>.

**Benefit Taxation** - IRS Section 117 regulations allow for preferential tax treatment of the IU Tuition Benefit for undergraduate-level courses. Undergraduate subsidy amounts are excluded from the employee's taxable income. IRS Section 127 (as described in the IU Section 127 Plan document) allows the preferential tax treatment of up to \$5,250 annually for employee subsidies paid toward graduate level tuition, but only for those described in the Eligible Employees and Retirees section of this booklet. Graduate level tuition subsidies for courses taken by a spouse are treated as taxable income to the associated employee or Retiree, as well as subsidies for graduate-level tuition for an employee above the \$5,250 IRS annual limit. In accordance with IRS regulations, it does not matter which family member took the graduate-level course, the Tuition Benefit is an employee/retiree benefit. Therefore, the employee or retiree is responsible for applicable taxes. Such taxes will be deducted from the employee's pay, and in the case of a retiree, the value of the graduate-level Tuition Benefit will be given as taxable gross income.

**Ineligibility for IU Tuition Benefit** - Tuition Benefit awards are reduced or canceled if the student's or employee's eligibility ceases. Eligibility for the Tuition Benefit will cease at the conclusion of the semester/term in which:

- The employee is no longer an eligible individual, in accordance with Plan provisions, for reasons other than disability, death or termination with IU Retiree Status; or
- The spouse or the dependent child cease to meet the definitions of a spouse or dependent child, respectively, as specified in the Plan; or
- The Dependent child receives a bachelor's degree, or the child accumulates 140 credit hours of IU Tuition Benefit awards, whichever comes first.

Students are responsible for paying the full adjusted tuition bill by its due date.

### **Required Forms and Priority Dates**

- Proof that an individual is a qualified dependent (marriage or birth certificate, guardianship orders, as applicable) is required at the time of initial enrollment and periodically thereafter. Failure to provide proof of dependent eligibility within 30 days of the University's written request for such proof may result in the termination of the IU Tuition Benefit award.
- An IU Tuition Benefit Enrollment form must be completed each academic year. The Tuition Benefit is not automatically renewed each year.
- A separate enrollment form needs to be completed for each student and for each campus of attendance. Only one IU Tuition Benefit subsidy will be applied each semester/term. The subsidy amount, however, can be split over multiple campuses.
- If the application form is processed after the student has been billed for tuition, the student is responsible for paying the full tuition bill by its due date. Once the application form is processed, the student will receive a refund through the Office of the Bursar.
- The IU Tuition Benefit Enrollment Form is available:
  - Online: <https://benefitenrollment.webhost.iu.edu/secure/home.cfm>; or
  - PDF format: <http://hr.iu.edu/benefits/tuition.html>; or
  - Paper format: your local Human Resources Office.
- Online enrollment forms, when submitted, will automatically be directed to University Human Resources to be processed.
- Paper forms should be submitted
  - by mail: Indiana University Human Resources, Attention: Tuition Benefit, 400 E. 7th Street, Poplars E165, Bloomington, IN 47405; or
  - by fax: (812) 855-3409; or
  - Scan and email: [enews@iu.edu](mailto:enews@iu.edu)
- If applying for Tuition Benefit retroactively, enrollment forms cannot be accepted after October 1st of the year in which the academic year ended.