



TUITION CONCESSION PLAN
Application for Tuition Reduction Benefits for
Dependent Children, Spouses, and Domestic Partners

Employee Information

Name:		<input type="checkbox"/> Staff	<input type="checkbox"/> Faculty
Dept/Office:	Phone:	Employee ID:	

Establishing Dependent Status for Children

- Will you, your spouse or partner, or former spouse claim this student as a dependent as defined by the IRS?
 Yes No

If you answered "Yes" to Question 1, you need not answer Question 2.
- If you answered "No" to Question 1, please attach a statement describing in detail the nature of your financial responsibility and support for this child in the last two years, and indicate fully why you consider this child a "dependent" for the purpose of tuition reduction. If the child does not qualify as an IRS dependent, then undergraduate tuition benefits will be reported as taxable income to you, the employee.
- Will your child be less than 26 years of age when the semester begins? Yes No

Dependent Child Attending Wake Forest University

Child's Name:	WFU ID Number:
Expected Graduation Date:	Date of Birth:
Type of Degree Pursuing:	
I request tuition reduction for my dependent child for the following:	
Annual <input type="checkbox"/> Fall <input type="checkbox"/> Spring <input type="checkbox"/> Summer I <input type="checkbox"/> Summer II <input type="checkbox"/> Study Abroad <input type="checkbox"/> Academic Year: _____ <small>(Applies to Fall/Spring only. Separate forms must be completed for the summer sessions)</small>	
Reminder: The payment card the student received must be returned to Financial and Accounting Services. This card clears the student for registration each session.	

Dependent Child Attending Another Institution

Child's Name:	Social Security Number:
Expected Graduation Date:	Date of Birth:
Type of Degree Pursuing:	
I request payment of tuition for my dependent child for the following:	
Fall <input type="checkbox"/> Spring <input type="checkbox"/> Summer I <input type="checkbox"/> Summer II <input type="checkbox"/> Academic Year: _____	
<input type="checkbox"/> I request the tuition and/or fees payment for my dependent child be mailed directly to the Institution. I have attached an official itemized copy of the tuition and academic fees bill. I understand the check (made jointly to the school and the student) will be mailed directly to the Institution. (The name and mailing address of the Institution must be completed below.) Institution: _____ _____	
<input type="checkbox"/> I have paid the tuition and/or fees and request reimbursement. I have attached an official itemized copy of the tuition and academic fees bill from the Institution and one of the following: front and back of the cancelled check, charge card statement, or a receipt marked paid. The address to which the check is to be mailed must be completed below. Mail check to: _____	

Tuition Reduction Request for Spouse or Domestic Partner

Spouse or Domestic Partner Name:	Social Security Number or WFU ID:
Type of Degree Pursuing:	Expected Graduation Date:
<input type="checkbox"/> I request tuition reduction for my spouse or partner to enroll in undergraduate course(s) at Wake Forest University (partner benefits are taxable; please contact your tax advisor for additional information).	
<input type="checkbox"/> I request tuition reduction for my spouse or partner for part-time study in the Graduate School of Arts and Sciences (graduate courses are taxable; please contact your tax advisor for additional information).	
Term of Attendance: <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> One Class <input type="checkbox"/> Audit	
<input type="checkbox"/> Fall <input type="checkbox"/> Spring <input type="checkbox"/> Summer I <input type="checkbox"/> Summer II Academic Year: _____	

Employee Certification

I certify that the information and/or charges provided on this form are accurate to the best of my knowledge. I understand that it is my responsibility to make sure that the tuition and/or fees payment is appropriately made and that my child has applied for the North Carolina Legislative Tuition Grant, if applicable.

Signature: _____ **Date:** _____

Tuition Refunds for Cancellation or Withdrawal Are To Be Refunded to Wake Forest University

HUMAN RESOURCES DEPARTMENT USE ONLY

HR REP SIGNATURE: _____ **DATE:** _____ **SESSION/YR.:** _____

AMOUNT APPROVED: _____ **BUDGET CODE:** _____

COMMENTS:

INFORMATION TO HELP YOU COMPLETE THE APPLICATION FOR TUITION REDUCTION BENEFITS FOR DEPENDENT CHILDREN

(References: HRPPM Section VI-14-1, Tuition Reduction Benefits for Dependent Children)

Completed forms are to be submitted to the Human Resources Department, Attn: Benefits

GENERAL

- The University provides tuition reduction benefits for undergraduate study by dependent children of eligible faculty and staff

ELIGIBILITY

- All faculty and staff who are regularly scheduled to work 1400 or more hours per year and have completed at least three continuous years of regular full-time service are eligible for tuition reduction benefits for their eligible dependent children.
- To be eligible, children (including legally adopted children, step-children, and dependent children of an employee's qualified same-sex domestic partner) must be less than twenty-six years old and substantially dependent upon the employee. The requirement of dependency is deemed to be satisfied if the child is claimed as a dependent on the employee's federal income tax return (or on the return of the former spouse of the employee or the return of the qualified domestic partner of the employee) for the tax year in which the tuition reduction benefit is granted. The benefit is available only for undergraduate study. A child already holding an undergraduate degree (baccalaureate or equivalent) is not eligible for tuition reduction benefits.
- Eligibility obtained on or before October 1. (February 1 for Spring Semester)

BENEFITS

Enrolled and Attending Wake Forest University

- Dependent children of eligible employees who meet admission requirements pay 6% of the annual tuition (rounded to the nearest \$10) in lieu of the normal tuition in the undergraduate schools effective with the first academic term following eligibility.
- There is no charge to attend Summer School.

Enrolled and Attending Other Institutions

- Dependent children actively enrolled in associate or baccalaureate degree programs at other universities, qualified technical schools, or community colleges (or certificate programs at a qualified technical school or community college) may receive the lesser of a specific dollar amount announced annually by the Human Resources Department or the cost of tuition and academic fees the student is required to pay. If both parents are employees, the full tuition benefit is available to each, but may not exceed the total amount of tuition and academic fees. There is an eight semester or twelve-quarter maximum per student and a lifetime maximum benefit per employee for all dependent children attending other institutions of higher education equal to ten times the annual dollar amount announced by the Human Resources Department.

INFORMATION TO HELP YOU COMPLETE THE APPLICATION FOR TUITION REDUCTION BENEFITS FOR SPOUSES AND DOMESTIC PARTNERS

(Reference: HRPPM Section VI-14.2, Tuition Reduction Benefits for Spouses and Domestic Partners)

Completed forms are to be submitted to the Human Resources Department, Attn: Benefits

GENERAL

- The University provides a tuition reduction benefit for undergraduate study or study in the Graduate School of Arts and Sciences at Wake Forest University by spouses and domestic partners of eligible faculty and staff.

ELIGIBILITY

- All faculty and staff who are regularly scheduled to work 1400 or more hours per year are eligible for tuition reduction benefits for their spouses, and domestic partners as defined in HRPPM Section VI-15, Domestic Partner Benefits.

BENEFITS

- Spouses and domestic partners of regular full-time faculty and staff of the Reynolda Campus are eligible for a tuition reduction of one-half (50%).
- Spouses and domestic partners of regular full-time faculty and exempt staff of the Reynolda Campus with ten or more years of continuous full-time service are eligible for a tuition reduction of two-thirds (66 2/3%).