

CERTIFICATION FOR TUITION WAIVER

Form must be completed each semester a waiver is sought

Waiver for: Employee Spouse/Domestic Partner Dependent Child

Semester/Year Fall _____ (year) Spring _____ (year) Summer _____ (year)

Employee Name _____

7-Digit Employee ID Number

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Dept. _____ Title _____

Phone _____ Email _____

Employment Status Staff Full-time Faculty Part-time Retired Other _____

Student Name _____

7-Digit Student ID Number

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(if different from employee information)

CWRU College or School Enrolled _____ Degree Sought (or enter non-degree) _____

Credit Hours Registered _____ Dependent's Date of Birth _____

Student Status: Undergrad coursework Grad/Prof coursework Dual Undergrad/Grad Program

I have read and understood all provisions of the tuition waiver policy (See overview on back of form, and HR Policy Manual: Compensation & Benefits IV-7a for specifics). My signature affirms that all information provided on this form is complete and true to the best of my knowledge. I acknowledge the potential taxation of the tuition waiver benefit when the waiver is issued for all graduate/professional coursework OR for undergraduate coursework applied towards a graduate degree OR for graduate/professional coursework taken by a non-degree enrollee. If such coursework is deemed a taxable benefit, a pro-rated dollar amount of the tuition waiver will be added to my (the employee's) taxable income over a period of months during the semester of enrollment, and all taxes will be withheld accordingly. I hereby acknowledge my responsibility to inform Benefits Administration, in writing, of any change in enrollment and/or employment status. Benefits Administration will adhere to the "class drop/add/withdrawal" percentages followed by the University Registrar. I understand that the tuition waiver is for tuition only and does not cover late fees, activity fees, lab fees or any other charges.

Employee Signature _____ Date _____

Supervisor's Approval Signature _____ Date _____

(not required for dependent or spouse waivers)

Please send tuition waiver requests via email to AskHR@case.edu or fax to 368-3582

----- For Employer Use Only -----

Taxable Amount \$ _____

Benefits Representative _____ Date _____

OVERVIEW

1. Official Class Schedule: student schedules will be checked in SIS. **A paper copy is not required.**
2. Waivers will not be issued for certificate programs, continuing education courses, or audited courses.
3. Withholdings for taxable courses (see policy for definition of taxable courses) will be made, in accordance with the employee's marital status and claimed allowances, over several months each semester, as follows: September through December for the Fall semester, February through May for the Spring semester, and July through August for the Summer semester. Marital status (for income tax purposes only) and allowances may be changed by submitting a new W-4 Form to the HR Service Center in 320 Crawford Hall.
4. Employees eligible for health insurance under the university's Benelect program are not eligible for the student health insurance program. A fee for the student health plan is charged automatically upon course registration and will be removed once the employee's tuition waiver is processed.
5. Employees may apply for a tuition waiver OR a tuition reimbursement during any one semester/quarter, but not for both during the same semester/quarter.
6. **Tuition waiver applications must be received by the first day of classes each semester.** Tuition waiver applications will not be accepted beyond this deadline and the employee is personally responsible for any balance due to the university.
7. Tuition waiver will be granted for the following semester only when the recipient is academically eligible to register. Students officially registered for the term (e.g., beyond the drop/add period) will have expended one semester of waiver eligibility.
8. If employment ceases prior to October 15 (Fall semester), March 15 (Spring semester), or July 15 (Summer semester), the tuition waiver for the semester is revoked and the student is personally responsible for the balance due to the university.
9. For EMPLOYEES the tuition waiver is limited to 6 credit hours in the fall and spring semesters and 3 credit hours in the summer semester. Waivers for employees enrolled in "specialized" degree programs (such as DM, EMBA, MPOD) are based on an adjusted tuition rate limited by the tuition rate for the school's regular professional graduate program and will not cover the full cost for these programs. Tuition and related costs not paid by waiver are the employee student's responsibility.
10. Authorization must be obtained from the employee's supervisor for all classes. Employees taking job related graduate level courses may submit a completed Affidavit of Qualification for Tuition Waiver Tax Exemption along with this form. Waivers with approved affidavits will be exempted from tax withholding.
11. For SPOUSES and DOMESTIC PARTNERS tuition waivers are available the semester following the employee's one year anniversary date. A copy of the marriage certificate or Affidavit of Domestic Partnership and Acknowledgement of Domestic Partnership Agreement must accompany this form for a first-time waiver.
12. Tuition waiver benefits are available only to an employee's DEPENDENT CHILDREN who qualify under IRS definitions, or to children of the employee's domestic partner who meet all the requirements in the *Affidavit of Domestic Partnership for Certification of Dependent Children*, and who are included in the listing of dependent children on that Affidavit. Dependent children must be candidates for a degree at the university. "Proof of Dependency" must accompany this form the first semester of enrollment each academic year (usually Fall semester). A new proof of dependency is required every year. Accepted forms of proof are:
 - a. Copy of parents' Federal income tax return listing the child as a dependent, or
 - b. Completed Case Proof of Dependency Form (for dependent children qualifying as dependents under the IRS definitions as stated in the Tuition Waiver Policy).