



Oregon State University STAFF FEE PRIVILEGES APPROVAL FORM - FAMILY MEMBER TRANSFER

****A New Form Must Be Completed by the Employee Each Term****

- Employees must submit this form by the deadlines posted at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>. **Be sure that you confirm the exact deadlines posted online each term.** These deadlines are typically:
 - Two weeks prior** to the first day of the term for **family members attending any school other than OSU.**
 - Four weeks** after the first day of the term for **family members attending OSU.**
- If the form is submitted after the specified deadline as noted [here](#), an appeal will be necessary. If the appeal is approved at the discretion of both the employing and enrolling campuses, the employee with approved late submissions will be responsible for accrued interest and billing charges.
- Retirees may not transfer the Staff Fees Benefit to family members.
- Benefit may not be transferred unless employee begins work in a qualifying position **on or before** the first day of the term.
- Applying for admission to OSU and registering for classes are processes that must be done independently of completing this form.
- If employment terminates before the first day of the term, the use of the Staff Fee Benefit is not permitted – even if previously approved by Human Resources.**

Questions?

All OSU employees can call 541-737-3103 or email StaffFeeForms@oregonstate.edu.

A. Employee Information Section (check one):

Classified Unclassified Post Doc Scholar

Print Name (Last, First, Middle): _____

Employee OSU ID: _____ Email Address: _____ Work Phone: _____

Employing Institution: _____ Employing Department: _____

B. Student Information Section:

Print Name (Last, First, Middle): _____ Date of Birth: _____

Campus Providing Classes: _____ ID # at Host Campus: _____ Year & Term: _____ / _____

Required (1) Does the student have a Bachelor's degree? yes no

Information: (2) Will the student apply these credits toward an advanced degree? yes no

(3) Is the student enrolled in a graduate program? (If yes, complete Section D.) yes no

C. I am transferring my Staff Fees Benefit to an eligible family member as indicated below:

My spouse. I certify we are legally married as of the first day of classes for the term noted.

My dependent child/relative. I certify they qualify as my dependent for tax purposes as of the first day of classes for the term.

My domestic partner. I certify we are partners through the following process (Check one):

Affidavit of Domestic Partnership Certificate of Domestic Partnership

My domestic partner's dependent child (not my natural or adopted child). I certify the child qualifies as my domestic partner's dependent for tax purposes as of the first day of classes for the term. The child is eligible by the following process (Check one):

Affidavit of Domestic Partnership Certificate of Domestic Partnership

D. Family Member registers for Graduate course(s):

Undergraduate classes do not need to be itemized to receive reduced tuition benefit. **Note: Maximum of 12 credit hours per term. Additional Graduate or Undergraduate credit hours are assessed at the regular per-credit-hour rate.**

DEPARTMENT Subject Code (if known)	COURSE Prefix & Number	DAY/TIME	TITLE	HOURS OF Credit	Audit	UNIVERSITY

E. Required Certification:

I certify that I will be: Employed at least 0.50 FTE in a qualifying position for the applying year/term
 On leave from my 0.50 FTE or more, qualifying position

By signature below, I certify that:

- I qualify for staff tuition rates and I am hereby transferring my staff fee privileges to the person named above for the year and term specified.
- I understand that a new form must be completed for each term I transfer my staff fee privileges.
- *I understand my family member must report receiving this tuition benefit when applying for student financial aid.*
- The family member receiving my transferred staff fee privilege is eligible under the program.
- I understand that misapplication of this benefit to a person who is not eligible may result in disciplinary or legal action and that I may be required to repay the amount of the benefit awarded to my family member.
- I understand I am responsible for any applicable taxes or withholdings, if any, as required under the Internal Revenue Code and by the state of Oregon.
- I understand that the university may require proof of eligibility for my family member.
- I understand the universities may exclude certain classes and programs. A list of excluded programs is available at the attending universities.

By signature below, I authorize each university where classes are attended by my family member to release all assessed staff tuition information to university Human Resources and payroll representatives.

Employee Signature

Date

F. Definitions:

- **Family Member:** Spouse, domestic partner, and qualifying children or qualifying relatives of the employee or domestic partner.
- **Domestic Partner:** An individual who meets the requirements outlined in the Affidavit of Domestic Partnership or has a Certificate of Domestic Partnership with employee.
- **Qualifying Child:** An individual who meets the requirements to be classified as a dependent child under federal law.
- **Qualifying Relative:** An individual who meets the requirements to be classified as a dependent relative under federal law

Please consult a tax professional if you have any questions regarding whether or not your dependent meets the qualifications under federal law.

G. Additional Information:

The Staff Fee Privileges Benefit for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. At campuses where an undergraduate differential tuition structure is in effect, the staff fee rate will be assessed at the "regular" (not differential) resident undergraduate tuition rate for both undergraduate and graduate students.

Family members are required to pay **all mandatory fees (including building, health, incidental fees) and any applicable course fees, payment deadline fees, registration fees, etc.** A one-time Matriculation Fee applies to family members admitted into a program. Fees assigned to participating self-support programs are paid by the family member unless waived by the university.

The staff benefit cannot be subdivided between family members during the term. Part-time employees **with less than 0.50 FTE** and their family members are not eligible for staff fee privileges. Staff fee privileges apply to all Oregon Public Universities (Eastern Oregon University, Oregon Institute of Technology, Oregon State University, Portland State University, Southern Oregon University, the University of Oregon and Western Oregon University). Campus presidents may elect to exclude certain programs or classes from this policy. Staff members who use the staff fee privileges for courses away from their employing (home) institution are subject to the tuition rates, policies and procedures of the instructing (host) institution. The institutions reserve the right to deny staff fee privileges for failure to meet the submission deadlines shown on this form.

Tuition is not assessed to family members auditing for-credit courses, but attendance must be with the instructor's consent and on a space-available basis. Audit may be used in addition to staff fee privileges during a term by one qualifying student, but may not be subdivided between family members during a term or semester. Qualified family members may be permitted to take noncredit classes at approximately one-third of the fee assessed to other registrants. All applicable course or material fees associated with auditing for-credit classes will be assessed by the institution and are the responsibility of the family member using the transferred benefit.

IRC Section 117 provides an exclusion from gross income for federal income tax purposes of undergraduate-level tuition reduction provided to an employee, an employee's spouse, and children who can be claimed as dependents of an employee for federal income tax purposes. This benefit also applies for Oregon state income tax purposes. In addition, for Oregon state income tax purposes the benefit is extended to an employee's registered domestic partner in Oregon. Tuition assistance for a domestic partner of an employee does not qualify for the exclusion if the domestic partnership is not registered in accordance with Oregon law. Tuition assistance that does not qualify for the exclusion is included as taxable income to the employee. The amount of taxable income generally is equal to the difference between the reduced tuition for total enrolled credit hours and the regular tuition for total enrolled credit hours. To the extent tuition assistance is included in the taxable income of an employee, the university will include the annual amount of the imputed income on the employee's W-2 form. A qualifying employee may need to seek tax advice regarding how to claim any available Oregon income reduction. Please consult a tax professional with any questions.

H. Submission Information:

- **All OSU employees:** email completed forms to StaffFeeForms@oregonstate.edu.

HR USE ONLY

Approved Denied & Notes: _____

HR Name & Signature: _____ / _____ Date: _____ University: _____

Note: Signature indicates only that the employee is eligible to use the Staff Fee Privileges Benefit. It is the responsibility of the employee or family member to verify if programs or courses are excluded from the benefit.