



Oregon State University
STAFF FEE PRIVILEGES APPROVAL FORM - EMPLOYEES

\*\*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.
o Two business days prior to the first day of the term for employees attending any school other than OSU.
o Four weeks after the first day of the term for employees attending OSU.
Employees are eligible to use or transfer the Staff Fee Benefit if employment in a qualifying position begins on or before the first day of the term.
If the form is submitted after the specified deadline as noted here, an appeal will be necessary.
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 campus Human Resources.

Questions?

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

A. Employee Information Section (check one): [ ] Classified [ ] Unclassified [ ] Retiree [ ] Post Doc Scholar

Print Name (Last, First, Middle): \_\_\_\_\_

Employee OSU ID: \_\_\_\_\_ Email Address: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Employing Institution: \_\_\_\_\_ Employing Department: \_\_\_\_\_ Year / Term: \_\_\_\_\_ / \_\_\_\_\_

Campus Providing Classes: \_\_\_\_\_ ID # at Host Campus: \_\_\_\_\_

B. Employee requests approval to register for the following course(s): [ ] Undergraduate [ ] Graduate

Required information: Are you enrolled in a graduate program? [ ] Yes [ ] No

C. Employee registers for course(s):

List all undergraduate or graduate level courses to be applied to the staff fee benefit. Note: Maximum of 12 credit hours per term. Additional graduate or undergraduate credit hours are assessed at the regular per-credit-hour rate.

Table with 5 columns: DEPARTMENT Subject Code (if known), COURSE Prefix & Number, DAY/TIME, TITLE, HOURS OF Credit Audit. Contains 4 empty rows for course entry.

D. Required Certification:

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

By signature below, I certify that:

- I have read and understand the information and agree to the terms and conditions described in this form.
I understand that I must satisfy the university's requirements for enrollment in classes.
I understand I must report receiving this tuition benefit when applying for student financial aid.
I understand I am responsible for any applicable fees, taxes or withholdings, if any, as required by the university or under the Internal Revenue Code and by the State of Oregon.
I authorize the university where I am enrolled in classes using staff fee privileges to release all assessed staff tuition information to university Human Resources and payroll representatives.
I understand the university where I enroll for classes excludes certain classes and programs from staff fee privileges. A list of excluded classes is available from the attending university.

Employee Signature \_\_\_\_\_

Date \_\_\_\_\_

Employee Name: \_\_\_\_\_ OSU ID: \_\_\_\_\_

I certify that the employee listed in Section A will be employed at least 0.50 FTE in a qualifying position for the year/term shown above and may enroll for \_\_\_\_\_ credit hours without interfering with assigned duties.

Supervisor Name \_\_\_\_\_

Work Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

#### F. Additional Information:

The Staff Fees Privileges Benefit is 30% of resident undergraduate tuition assessed at the 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 student employees. Employees using the staff fee benefit will not be assessed health services, building, or incidental fees and are therefore not eligible for services covered by these fees. **Employees are required to pay any applicable course fees, lab fees, payment deadline fees, registration fees, etc.** A one-time Matriculation Fee applies to employees admitted into a program. The employee is responsible for fees assigned to participating self-support programs unless waived by the university.

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 employees or family members auditing 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. Classes taken at no charge by an employee or family member must be identified in Section C of this form to ensure correct workload recording for the teaching faculty. Staff 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 employee.

An employee's eligibility to receive or transfer staff fee privileges will be verified through Human Resources system records. If classified academic year employees and 9-month faculty are on break when summer classes begin, the FTE immediately prior to the scheduled summer break is used to determine eligibility.

Generally, undergraduate level tuition reduction is treated as a non-taxable benefit to employees. IRC Section 127 allows up to \$5250 in tuition reduction in a calendar year for graduate level or advanced degree programs as a non-taxable benefit for the employee, **but not for family members**. An employee whose graduate tuition reduction benefit exceeds \$5250 in a calendar year will be notified by the payroll department. If the employee does not receive notification, they are required to contact their payroll department. The remaining tuition balance after the reduction benefit is assessed will be subject to applicable taxes. Taxable tuition benefits may be spread over a maximum of three months and are processed by the employee's campus for tax withholding. Please contact an Oregon tax professional if you have any questions about the possible tax implications of this benefit.

#### G. Submission Information:

- **All OSU employees:** submit completed forms to [StaffFeeForms@oregonstate.edu](mailto: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 employee's responsibility to verify if programs or courses are excluded from the benefit.**