



STAFF FEE PRIVILEGES

FREQUENTLY ASKED QUESTIONS (FAQs)

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Introduction

These frequently asked questions, combined with the information located on the Staff Fee Privileges Approval Forms, will answer most questions about the Staff Fee Privileges Benefit available to eligible Oregon State University (OSU) staff and family members.

Human Resources will send approved staff fee forms to the appropriate OSU or applicable non-OSU campus enrollment offices before the first day of classes.

Fillable approval forms are available on the Human Resources website at:

<https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

For additional information, including submission deadlines, please visit:

<https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

General Information

What is tuition reduction (Staff Fee Privileges or Staff Fee)?

Program through which eligible employees or their qualifying family member may register for courses at special rates.

Who is eligible to use them?

Oregon State University employees appointed at half time (0.50 FTE) or more and employed on or before the first day of the term may register for courses and request to apply the reduced tuition rate. Temporary employees, Graduate assistants, Clinical Fellows, and other student employees are not eligible. Eligible employees are also eligible to transfer the benefit to a qualifying member.

Employees and family members may register for a maximum of twelve (12) credit hours per term.

Employee's enrollment in courses must be approved by an employee's supervisor or manager and may not take precedence over the performance of an employee's duties.

The Oregon Public Universities reserve the right to deny staff fee rates for late submission of approval forms. If the form is submitted after the specified deadline, it may be approved at the discretion of both the employing and enrolling campuses. Employees with approved late submissions will be responsible for accrued interest and billing charges. Denials may be appealed to the employing university.

Employee Use of Staff Fee Privileges

When are employees required to submit their Staff Fee Privileges Approval form?

It is recommended that the completed form be submitted to Human Resources as far in advance as possible, but no more than one term in advance, to ensure time for processing. Three weeks before the term begins is likely sufficient.

To ensure your form is submitted on time, please refer to the OSU deadline dates at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

Must I get my unit's approval to use Staff Fee Privileges?

Yes. Your unit or supervisor must approve your use of Staff Fee Privileges to ensure that your department and job duties will not be affected by the number of credit hours you request.

What is the Staff Fee Privileges rate for tuition?

The staff fee rate is 30% of the current resident undergraduate tuition. Semester rates, where applicable, are calculated on adjusted term rates, 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.

As an employee using the Staff Fee Privileges, do I have to pay the same fees other students pay?

Employees are not assessed Application, Health Services, Building, and Incidental fees, and are therefore not eligible for services covered by these fees. No breakage or other deposit is required when registering for classes, however; employees are required to pay any applicable course fees, lab fees, payment deadline fees, registration fees, etc.

A one-time Matriculation fee also applies to employees admitted into a program.

Fees assigned to participating self-support programs are paid by employees unless waived by the university.

If I take a combination of graduate and undergraduate level courses, how is the Staff Fee Privileges rate determined?

To provide the highest value for Staff Fee Privileges, graduate level courses are offset by the staff rate first, before the staff fee rate is applied to undergraduate courses.

If I use the Staff Fee Privileges program, may I also audit courses?

Yes. Staff members may audit courses in addition to using Staff Fee Privileges. Tuition and Mandatory Fees (Programmatic, Universal, Building, Health, Incidental) are not assessed to courses audited by employees. However, any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee or family member.

Employees may audit classes on a space-available basis and are required to obtain the instructor's consent. Courses approved for audit by the instructor confer no credit to the student. Institutions are required to maintain a record of the courses audited and staff members must indicate any audited courses being taken on the Staff Fees Privileges Approval Form each term.

I am a ranked faculty member at OSU. May I use the Staff Fee Privileges benefit to pursue an advanced degree at OSU?

Yes. Per the Oregon State University Graduate School Faculty as Student Policy, employees who hold a faculty rank (as defined in the Faculty Handbook at <https://facultyaffairs.oregonstate.edu/faculty-handbook>), are required to obtain signed approval from the Graduate School Dean if seeking to pursue an advanced degree at the campus where employed. This approval process must be completed before submitting the Staff Fee Approval form to Human Resources.

Are there any programs or classes excluded from the Staff Fee Privileges benefit?

Yes. There are certain programs and classes that are excluded from the benefit. For a comprehensive list of classes and programs not eligible for the Staff Fee Privileges benefit, please go to:

<https://hr.oregonstate.edu/benefits/staff-fee-privileges-tuition-reduction/staff-fee-policies-and-procedures#excluded-programs>

What happens to the Staff Fee Privileges benefit if my employment with OSU is terminated even though I was approved to receive the benefit before termination?

In the event your employment terminates before the beginning of the next term (even if Human Resources has approved your request), the Staff Fee Privileges benefit is no longer available for your use and you will be assessed the full tuition amount if you continue to take classes. This policy also applies if you have transferred your Staff Fee Privileges benefit to your qualified family member. See the section on eligibility for additional information.

I am an OSU retiree who is taking for-credit classes. Is there a tax liability for the Staff Fee Privileges benefit I receive?

Retirees are not taxed on Staff Fee Privileges when taking for-credit undergraduate courses or graduate courses to complete an undergraduate degree. Retirees are taxed on Staff Fee Privileges associated with for-credit graduate courses if the aggregate reduction for the class course work in a calendar year exceeds \$5,250.

As an Oregon Health Sciences University (OHSU) employee, am I eligible to use the OSU Staff Fee Privileges rates?

No. In fall 2003, OHSU stopped participating in the Oregon Public University Staff Fee Privileges Benefit program and implemented its own reduced tuition program for OHSU employees. Additionally, OSU employees are not eligible to use the Staff Fee Privileges benefit for classes or programs offered by OHSU or OHSU programs offered on other Oregon Public University campuses.

May I use the staff fee benefit at more than one Oregon Public University during the term I have been approved for Staff Fee Privileges?

No. The Concurrent Enrollment policy was eliminated January 1, 2004. However, the Staff Fee Privileges benefit may be used at any Oregon Public University institution.

Transferring Staff Fee Privileges to a Family Member

NOTE: It is the responsibility of the employee transferring the benefit to certify that the family member receiving Staff Fee Privileges benefit is eligible under the program. Misapplication of this benefit to a person who is not eligible may result in disciplinary or legal action.

Who qualifies as a “family member” for purposes of receiving transferred Staff Fee Privileges?

- **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 contact an Oregon tax professional if you have any questions about the possible tax implications of this benefit.

What is the maximum number of credits an enrolled family member can use?

A maximum of twelve (12) hours per term may be used.

What is the Staff Fee Privileges rate for tuition benefits available to a family member?

A qualified family member may enroll for up to twelve (12) credit hours per term at the Staff Fee Privileges rate. At Eastern Oregon University, Portland State University, Southern Oregon University, University of Oregon, and Western Oregon University, the family member staff fee rate is 30% of regular (not differential) resident undergraduate tuition for both undergraduate and graduate students. Instruction rates vary by teaching institution and should be confirmed with the institution where classes will be taken.

Note: There is no tuition plateau available to family members using the staff fee rate.

How does the university determine whether my family member is eligible for the Staff Fee Privileges rate?

You must certify that your family member is eligible on the Staff Fee Privileges Family Transfer Approval Form. For example, with regard to a spouse, you certify that you are legally married; for a domestic partner, you complete and submit an Affidavit of Domestic Partnership each term with the Approval Form or obtain a "Certificate of Domestic Partnership." For a child or relative, you certify that the child or relative is your dependent, or the dependent of your spouse or domestic partner, for federal tax purposes.

Note: You may be required to submit a copy of your last year's tax return if asked to do so by the campus where you're employed.

If I transfer my Staff Fee Privileges benefit to one of my family members for one term or semester, can I use it myself the next term or semester?

Yes. You will need to complete a new approval form each term or semester and may change the qualified recipient each term or semester.

I have a stepchild and I personally have no custodial rights, but my spouse does and we list them as a dependent on our taxes. Do they qualify?

Yes. As long as your stepchild qualifies as your dependent child for tax purposes, they are your dependent and considered eligible for purposes of the Staff Fee Privileges program.

Is my child eligible to use the Staff Fee Privileges to enroll in university classes while still in high school?

Yes. If your dependent child meets the enrollment requirements of the university where classes are taken, they may use the Staff Fee Privileges up to the maximum of 12 credit hours per term.

May I transfer my Staff Fee Privileges benefit to more than one family member during a given term?

No. Staff Fee Privileges benefits may not be subdivided among family members during a term.

If I allow a family member to use my Staff Fee Privileges benefit, may I also use it the same term?

No. The Staff Fee Privileges benefit may not be subdivided between the employee and family members during a term.

As an employee, do I have to complete a form each term or semester to request that my Staff Fee Privileges be transferred to a family member?

Yes. The Staff Fee Privileges Approval Family Transfer Form must be completed each term to transfer the benefit to a family member. You can access the form at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

To ensure your form is submitted on time, please refer to the form deadline dates at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

May I transfer my Staff Fee Privileges benefit to a family member to use at another Oregon Public University? If yes, which form do I use and where can I get the form?

Your family member may use your Staff Fee Privileges at any of the Oregon Public Universities, with the exception of Oregon Health Sciences University. If you are an OSU employee, you should use the Oregon State University provided form. It is available on the OSU Human Resources website at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

If you are a non-OSU employee, please use the form provided by your Oregon Public University employer.

My spouse and I both work for an Oregon Public University. May we combine our Staff Fee Privileges so our child would receive 24 credit hours at the staff tuition rate?

No. An employee or transferee may use Staff Fee Privileges benefits only once per academic term, limited to a total of twelve (12) academic credit hours per term.

My child and I both work for an Oregon Public University. May I transfer my Staff Fee Privileges to them so they can transfer their Staff Fee Privileges to their own dependent child?

No. An employee or transferee may use the Staff Fee Privileges only once per academic term or semester, limited to twelve (12) academic credits per term.

If I transfer my Staff Fee Privileges, will it affect financial aid for my family member?

Yes. The value of the Staff Fee Privileges rate is considered a resource available to the family member and is added into the calculations for determining the total financial aid package. It may affect the type of award or

amount of award given. Contact the financial aid office at the campus hosting the academic program for more information.

Do Staff Fee Privileges rates apply if the person enrolling in classes has not met residency requirements?

Yes. Eligible OSU employees, as well as their eligible family members, may enroll at the campus where courses are taken at the resident undergraduate rate. Staff Fee Privileges are not affected by residency.

Must family members pay all of the student fees?

Yes. Staff Fee Privileges only reduce tuition amounts for family members. Except for courses taken on audit status, all applicable student fees are charged to eligible family members using the transferred benefit.

May Staff Fee Privileges be used for "on-line" courses?

Generally, on-line courses are treated the same as other classes. Beginning January of 2023 this applies to Staff Fee Privilege for both OSU and non-OSU employees and their dependents. How a class is delivered is not a question that determines whether specific classes are included or excluded within a given program. However, certain Ecampus courses and program, as well as other classes, may be excluded from the Staff Fee Privileges benefit. Please review the list of excluded programs at: <https://hr.oregonstate.edu/benefits/staff-fee-privileges-tuition-reduction/staff-fee-policies-and-procedures#excluded-programs>

If I transfer the Staff Fee Privileges to a family member, may they also audit courses?

Family members may audit classes on a space-available basis and are required to obtain the instructor's consent. Courses approved for audit by the instructor confer no credit to the student. Institutions are required to maintain a record of the courses audited and staff members must indicate any audited courses being taken on the Staff Fees Privileges Approval Form each term.

Are fees assessed to employees or a family member who audit courses?

No. There are no fees assessed to audit a course. See information on fees applicable to family member who is auditing for-credit courses in the section above.

Must I get my department's approval to transfer my Staff Fee Privileges to my family member?

No. You do not need department or supervisor approval to transfer staff fee privileges.

I am an employee who is legally separated from my spouse. Is my spouse still eligible to use the Staff Fee Privileges benefit?

Yes. Although you and your spouse are legally separated, your spouse is still eligible to receive the Staff Fee Privileges if you request for the benefit to be transferred to them.

Are there any exceptions to the requirement to have the completed application for Staff Fee Privileges before the deadline each term?

The Oregon Public Universities reserve the right to deny staff fee rates for late submission of approval forms. If the form is submitted after the specified deadline, it may be approved at the discretion of both the employing and enrolling campuses. Employees with approved late submissions will be responsible for accrued interest and billing charges. Denials may be appealed to the employing university.

To ensure your form is submitted on time, please refer to the form deadline dates at <https://hr.oregonstate.edu/benefits/current-employees/tuition-reduction-staff-fee-privileges>.

Domestic Partner Questions

I am transferring my Staff Fee Privileges to my domestic partner. How does withholding work in this case?

Employees whose same-sex domestic partners take undergraduate classes are generally not subject to Oregon income tax on the imputed value where the domestic partnership was created under Oregon law. The employing university will provide the annual amount of the imputed income on the employee's W-2 form. The employee may need to seek tax advice regarding how to claim the associated Oregon income reduction. Please note that non-resident domestic partners' imputed tax value of staff fee rates is based on non-resident tuition rates.

Please contact an Oregon tax professional if you have any questions about the possible tax implications of this benefit.

Are my domestic partner's children eligible to take classes at Staff Fee Privileges rates?

Yes. Your domestic partner's children are eligible if they are considered your domestic partner's dependents for tax purposes. You will pay state and federal withholding on the imputed value of the tuition benefit for both undergraduate and graduate tuition for a dependent child who is the natural or adopted child of your domestic partner. However, if your domestic partner's child is also your child, or if you have adopted the child and are able to claim the child as a dependent on *your* tax return the tuition benefit is not taxed.

Who Should I Contact with Questions?

For questions regarding **dependent status**, please consult an Oregon tax professional.

For questions regarding the submission of the **approval form** or the form generally please contact:

- **OSU Cascades employees only:** OSU Cascades Campus HR, 541-322-3100, human.resources@osucascades.edu
- **All other OSU locations:** StaffFeeForms@oregonstate.edu

For questions regarding **tuition** amounts and implications for Oregon State University, please contact Student Accounts at StudentAccountServices@oregonstate.edu.

For questions regarding **tuition** amounts and implications for other Oregon Public Universities hosting academic programs, please contact their student account office.