



**Oregon University System
STAFF FEE PRIVILEGES APPROVAL FORM FOR EMPLOYEES AND FAMILY MEMBERS
Academic Year 2003 - 2004**

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

Important Information! Please read before you complete the form.

- Submit this form to the Human Resources office of the campus where employed.
- Eligibility to transfer staff fee privileges to qualifying family members must be verified by Human Resources **no later than the first day of classes** of the term of enrollment.
- Staff members requesting staff fee privileges for their own use should submit this completed form, or their employing university's staff fees form, by the first day of classes of the term of enrollment.
- If this form is not submitted by the above deadlines, you will be responsible for accrued billings and interest charges.
- You or your family member must also complete admission and registration through the campus where classes will be taken.

A. Employee Information Section - check one **Classified** **Unclassified**
 Retiree **Other (describe)**

Last Name _____ First Name _____ M.I. _____
 ID or Social Security Number _____ Email Address _____ Work Phone: _____
 Employing Institution _____ Year and Term _____ / _____ Department _____

I certify that I will be employed at least .50 FTE in a qualifying position for the year/term shown above or will be retired or will be on leave from my .50 FTE or more position. I have read and understand the information on this form. I agree to the terms and conditions described on this form, and understand that I must satisfy the university's requirements for enrollment in classes. 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, or my family member, enroll in classes using staff fee privileges to release all assessed staff tuition information to university Human Resources and payroll representatives, and to the Oregon University System. 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 through the registrar and at <http://www.ous.edu/benefits/stafffeepriv.htm>.

Employee Signature _____
Date

I am applying for staff fees for: myself - Complete sections B, C, and D
 family member - Skip to sections D and E (Transfer is not available to retirees.)

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

Required Information:	(1) Do you have a Bachelor's degree?	yes	no
	(2) Will you apply these credits toward a graduate degree?	yes	no
	(3) Are you enrolled in a graduate program?	yes	no
	(4) Do you hold faculty rank? (If yes, see Section R of this form.)	yes*	no

***Approval is granted by the Graduate School of _____ for pursuit of a graduate degree while maintaining a faculty position.** (University)

Graduate School Dean Signature _____
Date

C. Department Approval Section

I certify that the employee listed in the Employee Section will be employed at _____ FTE in a qualifying position for the year/term shown above or is _____ on leave, and may enroll for _____ credit hours shown in Section D without interfering with assigned duties.

Supervisor (Print Name) _____ Supervisor Signature _____ Work Phone _____ e-mail Address _____ Date _____

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D. Employee/ Family Member/Domestic Partner Student registers for the following course(s):

DEPT.	COURSE #	DAY/TIME	TITLE	# CREDITS		UNIVERSITY
				credit	audit	
.
.
.
.

E. Family Member Information Section - To be completed by employee. Check one of the following:

I am transferring my staff rate for tuition benefit to:

my spouse, and I certify that we have been legally married as of the first day of classes for the term noted below.

my same-sex domestic partner **my opposite-sex domestic partner**

and we have completed and submitted the Affidavit of Domestic Partnership for Transfer of Staff Fee Privileges to the Human Resources office along with this form. (See Section M if non-resident, opposite-sex partner.)

my dependent child, and I certify that my child qualifies as my dependent for tax purposes as of the first day of classes for the term noted below.

Last Name _____ First Name _____ M.I. _____

ID or Social Security Number _____ Date of Birth _____

Year and Term _____ / _____ Campus Providing Classes at Staff Tuition Rates _____

Required Information:	(1) Does the student have a Bachelor's degree?	yes	no
	(2) Will the student apply these credits toward an advanced degree?	yes	no
	(3) Is the student enrolled in a graduate program?	yes	no
	(4) Note: The list of classes in Section D must be completed.		

Certification and Release for Transferring Staff Fee Privileges (signature required)

I certify that, based on the information provided in Section A of this form, I qualify for staff tuition rates and I am 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 further certify that the family member receiving my transferred staff fee privileges is eligible under the program, and I understand that misapplication of this benefit to a person determined to not qualify after tuition is assessed may result in disciplinary or legal action. 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 that I provide proof of eligibility for my family member. I authorize each university where classes are attended by me or by my family member to release all assessed staff tuition information to university Human Resources and payroll representatives, and to the Oregon University System.

Employee Signature

Date

HR USE ONLY

Staff Fee Privileges: Approved Denied Notes: _____

HR Name/Signature _____ / _____ University _____ Date _____

TUITION ASSESSMENT (Registrar / Business Services)

Note: HR approval must be signed before tuition is assessed.

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F. Tuition and Associated Fees

1. Staff Fees (maximum of 12 credit hours per term)

Quarter/Term: 25% of Resident Undergraduate Tuition of the Teaching Institution

Semester: 150% of Resident Undergraduate Tuition per Quarter/Term of the Teaching Institution

A qualified employee, family member or domestic partner enrolled for more than twelve (12) credits in one term must pay for additional credit at the per credit rate applicable to resident undergraduate or graduate student, depending upon the degree status of the person enrolled. All applicable credits in excess of twelve (12) shall be at the standard institutional rate.

2. Fees

All **mandatory student fees apply to family members**. Students enrolled at staff tuition rates are entitled to services permitted by the university where classes are taken.

Employees are not assessed Health Services and Incidental Fees, and are therefore not eligible for services covered by these fees. Employees are required to pay applicable Energy, Technology, Resource, and Laboratory/Course fees, as well as any Late or Change of Registration fees. A one-time Matriculation fee also applies to students admitted into a program. Fees assigned to participating self-support programs are paid by employees unless waived by the university.

3. All registration and payment deadlines apply.

G. Eligibility Requirements

Faculty and staff (not including temporary employees, graduate assistants and other student employees) employed half-time or more in a qualifying position may use **or** transfer their staff fee privileges to one family member each term. The benefit cannot be subdivided among family members during the term. The employee or family member may register for a maximum of 12 credit hours per term at the staff fees rate. Part-time employees with less than .5 FTE and their family members are not eligible for staff fee privileges.

Staff fee privileges apply to all OUS institutions. This includes Eastern Oregon University, Oregon Institute of Technology, Oregon State University, Portland State University, Southern Oregon University, the University of Oregon and Western Oregon University. Universities may elect to exclude certain programs or classes from this policy. Qualified employees may use the staff fee privileges at the institutions of their choice. Staff members who use the staff fee privileges for courses away from their home (employing) institution are subject to the policies and procedures of the instructing institution.

"Family member" includes a spouse or domestic partner and the dependent children of the OUS employee. An employee must be legally married to a spouse, and dependent children must qualify as dependents for tax purposes. A domestic partner must meet the requirements outlined in the Affidavit of Domestic Partnership form for Transfer of Staff Fee Privileges.

Employees on approved leave are eligible for staff fee privileges if their last FTE on record qualifies them for staff rates. An eligible staff member on approved leave may transfer staff fee privileges to a qualified family member. The family member may register for a maximum of 12 credit hours per term at the staff rate.

Retired employees are eligible for staff fee privileges for themselves if the last FTE on record qualifies them for staff rates. Retirees should contact the Human Resources office for information about the maximum number of credit hours per term that may be taken at the staff rate. Retirees (including those working 600 or 1039 hour appointments) and other individuals who qualify for staff fees under OAR 580-022-0030(4) are not eligible to transfer their benefit to family members.

An employee's eligibility to receive or transfer staff fee privileges to a family member will be verified through Human Resource 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 to transfer the benefit to a family member. Employees working only during the summer session and employees not returning in the fall are not eligible to transfer staff fee privileges to a family member during the summer.

These guidelines are effective beginning fall term 2002. Staff fee rates and program continuation are determined periodically by the Oregon State Board of Higher Education.

H. Classified Employees

Classified employees appointed at least half time are eligible to receive staff fee privileges for supervisor-approved classes and to transfer staff tuition benefits to a family member.

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I. Auditing

Fees are not assessed to employees or family members auditing courses, but attendance must be with the instructor's consent and on a space-available basis. Classes taken at no charge must be identified in Section D of this form.

J. Noncredit Classes

Staff and their qualified family members may be permitted to take noncredit classes at approximately one-third of the fee assessed to other registrants. Teaching units are not required to extend staff fees for noncredit courses, or self-sustaining workshops.

K. Taxes - Employees or Family Members Enrolled in Advanced Degree Programs or Graduate Level Courses

For employees and their family members, IRC Section 117 permits undergraduate level tuition reduction as a non-taxable benefit. However, tuition assistance for family members enrolled in graduate level or advanced degree programs is included as taxable income to the employee. That is, the difference between the reduced tuition for total enrolled credit hours and the regular graduate tuition for total enrolled credit hours will be taxed. For staff members - but not family members - IRC Section 127 further allows up to \$5250 in tuition reduction for graduate level or advanced degree programs as a non-taxable benefit. An employee whose graduate tuition reduction benefit exceeds \$5250 in a calendar year is responsible to notify Human Resources. Taxable tuition benefits may be spread over a maximum of three months, and are processed by the employee's campus for tax withholding.

L. Taxes - Domestic Partners

Staff fee privileges for a domestic partner may result in additional imputed income (the difference between the reduced tuition for total enrolled credit hours and the regular tuition for total enrolled credit hours) to the employee. The university system will withhold federal and state taxes on the imputed value of staff fee privileges for undergraduate and graduate classes taken by an employee's domestic partner. Employees whose same-sex domestic partners take undergraduate classes may be eligible for relief from state taxes, and should consult with a tax advisor for additional information. Non-resident, opposite-sex domestic partners' imputed tax value of staff fee rates is based on non-resident tuition rates under the provisions of OAR 580-010-0086.

M. Taxes - Nondiscriminatory Benefit

Under IRC 117, the staff fees plan is tested annually to determine that staff fee privileges for undergraduate courses may be offered as a non-taxable benefit to all employees. Tax status for staff fee privileges is updated at the beginning of winter term each year and provided to campus Human Resources offices. Employees should check on taxability changes when they request staff fee privileges.

N. Tuition and Program Limitations

Employees and their family members are subject to all registration and tuition payment deadlines and fines. Consult the schedule of classes for specific dates and amounts applicable to the university where classes are attended.

O. Excluded Programs and Classes

Each university maintains a list of programs and classes for which staff fee privileges may not be applied. The decision to exclude classes rests solely with each university and is subject to change. For information about excluded classes, check the OUS internet website at <http://www.ous.edu/benefits/stafffeepriv.htm> or contact the registrar's office on the campus where classes will be taken.

P. Financial Aid

Students receiving financial aid should contact their financial aid offices to determine the effect of staff fee privileges on their financial aid. At the time of registration, students are required to provide tuition assessors notice that they are financial aid recipients.

Q. Concurrent Faculty/Graduate Student Enrollment

Staff holding faculty rank are required to obtain approval from the Graduate School of the campus where admitted to a Masters or Doctoral Program. Requests for concurrent Faculty/Graduate Student enrollment are reviewed by the Graduate School for issues of conflict of interest to ensure compliance with OAR 580-20-0050. A Staff Fee Privileges Approval Form must be signed by the Graduate School each term before staff seek eligibility verification through the Human Resources office or tuition assessment.

For questions and information about Staff Fee Privileges, contact the Human Resources office on your campus.