

# APPLICATIONS DUE IN THE DEPARTMENT OF HUMAN RESOURCES

**BY 5:00 PM ON DEADLINE**

## **Tuition Assistance for Classified and Hourly Staff Application**

**NOTE: All applicants must complete items 1 - 13**

1. University ID # \_\_\_\_\_
2. Name \_\_\_\_\_
3. Home Address \_\_\_\_\_
4. Home Phone Number \_\_\_\_\_ - \_\_\_\_\_
5. Full-time Classified \_\_\_\_\_ Part-time Classified \_\_\_\_\_ Hourly \_\_\_\_\_ Hire Date \_\_\_\_\_
6. Department \_\_\_\_\_
7. Work Extension \_\_\_\_\_
8. Position Title and Position Number \_\_\_\_\_
9. Brief description of duties & responsibilities: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Place an X on the appropriate line to indicate the type of payment requested:  
\_\_\_ Deferment (tuition is pre-paid)      \_\_\_ Remission (tuition is reimbursed)
11. What school will you be attending?  
If not attending Old Dominion University, please state reason(s):  
\_\_\_\_\_
12. Is this the first time you have requested tuition assistance from this office?  
\_\_\_ Yes      \_\_\_ No
13. This application is for the following semester:  
\_\_\_ Fall      \_\_\_ Spring      \_\_\_ Summer

## Course Information

Please complete all information for each course for which tuition assistance is being requested. Do not list alternate course selections.

### Course 1

### Course 2

Course Title \_\_\_\_\_  
\_\_\_\_\_

Course Title \_\_\_\_\_  
\_\_\_\_\_

CRSE Number \_\_\_\_\_

CRSE Number \_\_\_\_\_

Days \_\_\_\_\_

Days \_\_\_\_\_

(\*) Times \_\_\_\_\_

(\*) Times \_\_\_\_\_

Credit Hours \_\_\_\_\_

Credit Hours \_\_\_\_\_

If ODU course, will it be taught on-campus or off campus?

If ODU course, will it be taught on-campus or off campus?

\_\_\_ on campus    \_\_\_ off campus

\_\_\_ on campus    \_\_\_ off campus

- Are you registering for course(s) being offered during the workday?

\_\_\_ NO

\_\_\_ Yes (Supervisor's Signature is **REQUIRED**)

**If yes, what type of release time/leave/adjusted work hours will you be using for the course(s). Only classified employees may use *release time* and *personal leave*. This release time is considered "work" time and should be included in the regular work hours reported via web time entry. Supervisors must note the release time in the Comments Section of the employee's timesheets for each pay period that classes are attended. (i.e. educational release time (dates) from (begin time) to (end time). Supervisors should also track this release time by some method separate from web time entry and maintain this information in their department.- Employees may use the *adjusted work hours* option. All requests are granted at the supervisors' discretion.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Supervisor's Signature: \_\_\_\_\_

\*\* All information requested above should be provided before the supervisor signs.

**IF COURSE IS OFF CAMPUS THE MAXIMUM PAYMENT WILL NOT EXCEED THE IN STATE TUITION RATE AT OLD DOMINION UNIVERSITY**

Place an X on the appropriate line to indicate the type of aid requested:

Job Related                      **If Job Related complete Section A.**

Degree Seeking                      **If Degree Seeking complete Section B.**

**Section A - Job Related Course(s)**

Justification: Write a brief justification indicating how the course(s) requested will assist you in your current job duties, provide new knowledge and skills to enhance job performance, support the University's mission and/or enhance the University's ability to respond to current and future needs.

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\_\_\_\_\_ (Employee Signature)                      \_\_\_\_\_ (Date)

**Section B - Career Development Course(s)**

Have you previously submitted a tuition assistance request for your degree program?

- Yes
- No (Attach letter of intent.)

Have you made any changes to your degree program?

- Yes (Submit new letter of intent.)
- No

Degree Information:

School: \_\_\_\_\_

Degree Sought: \_\_\_\_\_

Number of hours until completion date: \_\_\_\_\_

Anticipated completion date: \_\_\_\_\_

\_\_\_\_\_ (Employee Signature)                      \_\_\_\_\_ (Date)

## Tuition Assistance Program: Terms of Agreement

Please read the following regulations. **Signature is required.**

1. Payment of course becomes the responsibility of the employee if the employee:
  - a. receives a grade of less than a B-minus (B-) if graduate course, D or F if undergraduate course, or I;
  - b. drops or withdraws (W/WF) from an approved course **after** tuition deadline;
  - c. terminates employment during the semester;
  - d. changes an approved course to an audit.
  
2. Tuition assistance may not be approved if:
  - a. the employee dropped, withdrew, receives a grade of less than a B-minus (B-) if graduate course, D or F if undergraduate course, or I for two or more semesters;
  - b. the employee had the same course approved previously and dropped, withdrew, received an I, less than a B-minus (graduate course), D or an F (undergraduate course) and is requesting tuition assistance for the same class.
  - c. the employee does not provide proof of registration for the course requested.
  
3. **If requirements of this program are not met, a payroll deduction is, by this agreement, authorized to satisfy a tuition debt.** It is understood that the debt may be paid through the Cashier's Office in the Office of Finance. If this is not done in a timely manner, a **payroll deduction** is herewith authorized to be processed for the amount of indebtedness against the employee's paycheck. Late fees and, if applicable, collection fees may be assessed by the Office of Finance.
  
4. The request for tuition assistance is contingent upon the availability of funds and will be approved based on seniority of employees applying for aid. If funds are not available at the time the request is submitted, the indebtedness for the course remains the responsibility of the student.
  
5. Payment for any course will not exceed the in-state tuition rate for Old Dominion University.
  
6. Failure to comply with the tuition assistance program policy may influence future decisions concerning such tuition assistance.
  
7. Changes to the original application (drop/add/withdrawal) must be reported immediately to Human Resources.
  
8. An appeal may be filed with the VP of Human Resources should tuition be denied for any reason other than for lack of available funds.

### **Certification**

**I certify that I have read and understand the eligibility requirements and processing procedures for the tuition assistance program. The information I have provided is complete and accurate to the best of my knowledge.**

**Signature:**

\_\_\_\_\_ **Applicant**

**Date** \_\_\_\_\_

**Important Notice: tuition assistance received for graduate level courses may be considered as taxable income.**

**For the Human Resources Department Use Only**

**Date Received** \_\_\_\_\_ **Date Approved** \_\_\_\_\_ **Denied/Reason** \_\_\_\_\_

3/31/09

# Old Dominion University

## Tuition Assistance for Classified and Hourly Staff

### General Information & Instructions

#### General Information

Tuition assistance is available to classified and hourly employees whose income does not exceed \$89,000.00 annually. Full-time classified employees must have completed one year of full-time service at the University at the deadline date. Part-time classified and hourly employees must have finished three years of service at the University. Tuition assistance applies only to tuition; it does not apply to books, travel, supplies, etc. Employees must remain a "contributor" or higher performance evaluation rating. Prior to submitting tuition assistance requests for courses at Old Dominion University, you must be admitted through the Admissions Office.

#### Deadlines

The deadlines for submission of applications and proof of registration is August 1 (by 5:00 pm) for the fall semester, December 1 (by 5:00 pm) for the spring semester, and May 1 (by 5:00 pm) for all summer sessions, unless the first falls on a weekend and then the deadline will be the first work-day following the first.

#### Types of Aid

##### Job Related

Coursework must relate to current job duties, provide new knowledge and skills to enhance job performance, support the University's mission, and/or enhance the University's ability to respond to current and future needs.

##### Career Development

Career development aid assists employees to obtain degrees that will increase the employees' mobility opportunities within the University. In addition to the required forms, employees will need to submit a **letter of intent** stating how the particular degree will be of benefit to themselves and to the University.

#### Types of Payment

##### Deferment

Tuition assistance program pays qualifying tuition at the beginning of the semester.

##### Remission

Employee is reimbursed for tuition at the conclusion of a course when all qualifications have been met.

#### Maximum number of hours for full-time classified employees:

Subject to the availability of funds, the allowable amount of credit hours per year is 15, with a maximum of:

**Not to exceed 6 credit hours in the Fall Semester**

**Not to exceed 6 credit hours in the Spring Semester**

**Not to exceed 3 credit hours in the Summer Sessions**

Benefit for part-time classified and hourly employees:

**75% of the benefit described above for part-time classified and hourly employees  
or less (prorated upon the hours worked per average 40 hour week)**

**Release Time** – Only classified employees may request time release of 3 hours or less per week to attend class(es). Release time will be prorated for part-time classified employees based on their work schedule. Release time must be noted in Comments section of Web-time entry.

**Adjusted Work Hours** - Employees may be allowed to adjust work hours so as to work their required hours per week.

**Use Personal Leave** - Classified employees may be allowed to use their annual, compensatory or overtime leave.

**All requests, as defined above, are granted at supervisors' discretion and supervisors are required to sign the application.**

#### **State or Federal Financial Aid:**

Expected tuition assistance from the Department of Human Resources must be reported by the student to the Office of Student Financial Aid, no later than the date the application for tuition assistance is completed, if the employee has applied, or intends to apply for, federal or state aid. The Office of Student Financial Aid is required to reduce federal or state aid (including loans) in most cases when other forms of assistance are anticipated.

## **Instructions for Applying for Tuition Assistance for Classified and Hourly Staff**

### **Old Dominion University Students (Deferment)**

1. Complete and submit the tuition assistance application, to the Department of Human Resources, Building II including proof of registration, and any other appropriate documents such as letter of intent (if degree seeking) before the designated deadline. Failure to submit your registration receipt or proof of registration may result in non-payment of tuition.

**NOTE: Sign and date Terms of Agreement portion of the application.**

2. If any approved courses are dropped after registration, send a copy of the drop/add form to the Department of Human Resources, Building II immediately.

### ***Students at Other Institutions***

1. Complete and submit the tuition assistance application, proof of registration, and any other **appropriate documents such as letter of intent** (if degree seeking) before the designated deadline.

**NOTE: Sign and date Terms of Agreement portion of the application.**

2. Sign Agreement stating that after completion of the semester, employee will continue employment at Old Dominion University for one year.
3. After receiving approval letter addressed to other institution, present it to cashiers office to indicate how payment will be made.
4. Notify the Human Resources Department, Building II, immediately if you decide **not to register for the approved course.**
5. At the end of the semester, send a copy of class grade(s) to the Human Resources Department, Building II.
6. If any approved courses are dropped after registration, send a copy of the drop/add form to the Department of Human Resources, Building II.

### **Remission Students (ODU and Other Institutions)**

1. Complete and submit the tuition assistance application, proof of registration, and any other appropriate documents such as **letter of intent** (if degree seeking) before the designated deadline.

**NOTE: Sign and date Terms of Agreement portion of the application**

2. At the end of the semester, send a copy of registration receipt, proof of payment, and class grade(s) to the Department of Human Resources. Proper documentation will be sent to Accounts Payable and a reimbursement check will be sent to your home address.
3. If any approved courses are dropped after registration, send a copy of the drop/add form to the Department of Human Resources, Building II, within five days.

**APPLICATIONS WILL BE APPROVED IN ORDER OF SENIORITY OF EMPLOYEE APPLYING FOR TUITION ASSISTANCE. CALL HUMAN RESOURCES AT EXT. 3-4237 IF YOU HAVE ANY QUESTIONS.**

**3/23/09**

**TAXABLE TUITION ASSISTANCE  
GRADUATE COURSES**

**Background and Job Related Issues:**

**Undergraduate tuition assistance.** Old Dominion University offers “tax free” undergraduate tuition assistance to faculty/staff and their dependents/spouses under IRC Section 117.

**Graduate tuition assistance.** The Economic Growth and Tax Relief Reconciliation Act of 2001 permanently re-enacted Section 127 to allow Old Dominion University to offer “tax free” graduate tuition assistance to faculty/staff. Graduate level classes taken by faculty and staff after December 31, 2001 will no longer be taxed. However, the Section 127 extension does not apply to graduate level courses taken through the tuition assistance program for dependents and spouses of faculty, faculty administrators, and classified and hourly staff.

Graduate courses taken through the tuition assistance program by spouses/children/dependents continue to be taxable to the employee. The taxable amount will be added to the employee’s taxable wages per the payroll schedule below and all federal, state and FICA taxes will be withheld as required.

**Tax Impact and Payroll Schedule:**

Taxable Graduate Level Tuition Assistance (for spouses/children/dependents) is still considered a “non-cash taxable fringe benefit.” When the taxable amount is added to the employee’s taxable wages for the pay period, all federal, state and FICA taxes are required to be withheld. Taxable Graduate Tuition Assistance (for taxable courses taken by spouses/children/dependents) will be added as follows:

<b>Semester Assistance Received</b>	<b>Pay Date Assistance Taxed</b>
<b>Spring Semester</b>	<b>4/16 and 5/1</b>
<b>Fall Semester</b>	<b>11/16 and 12/1</b>

The expected additional tax impact is approximately 27% additional federal withholding; 5% additional state withholding and 7.65% additional FICA withholding. **Remember, this is just an estimate and can change depending on the employee’s current W-4 form (federal) and VA-4 form (state) on file.** Each participant will receive specific information about the amounts that will be added to taxable wages and the additional taxes that will be withheld from their pay about a week prior to the pay date the benefits are scheduled to be taxed.

For additional information about the taxability of graduate level tuition assistance, please call the Payroll Office at 683-4262.