Oregon Public Universities
STAFF FEE PRIVILEGES APPROVAL FORM - *EMPLOYEES*

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

- Employees must submit approval form to campus HR Department ***no later than two days prior to the first day of classes.***
- 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 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.
- If employment terminates before the start of classes, the use of the Staff Fee Benefit is ***not permitted*** *- even if previously approved by campus Human Resources*

A. Employee Information Section (check one): ☐ **Classified** ☐ **Unclassified** ☐ **Retiree**

Print Name (Last, First, Middle): _____

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

Employing Institution: _____ Year and Term: _____ / _____ Employing Department: _____

Campus Providing Classes (if different from employing campus): _____ ID # at Host Campus: _____

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

Required	(1) Do you have a Bachelor's degree?	☐ **yes**	☐ **no**
Information:	(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 university faculty rank?	☐ **yes**	☐ **no**

If the answer to #4 is "yes", Section F of this form MUST be completed.

C. Employee registers for the following 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 undergraduate or graduate credit hours will be assessed at the current per-credit-hour rate.***

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

D. Required Certification:

I certify that I will be:
☐ Employed at least .5 FTE in a qualifying position for the applying year/term
☐ Retired
☐ On leave from a .5 FTE or more, qualifying position

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

E. Required Department Approval Certification:

I certify that the employee listed in Section A will be employed at least .5 FTE in a qualifying position for the year/term shown above and may enroll for _____ credit hours without interfering with assigned duties.

_____ _____

Supervisor (Print Name) Supervisor Signature

_____ _____ _____

Work Phone Email Address Date

F. Academic Faculty Approval by the Graduate School Dean:

Employees holding ***faculty rank*** (instructor, senior instructor, research assistant, research associate, lecturer, assistant professor, professor) and seeking admission into a Masters or Doctoral program ***at a campus where employed*** are required to obtain approval from the Graduate School Dean ***before*** submitting the signed approval form to the Human Resources office.

The employee listed in Section A is hereby granted approval by the Graduate School to pursue a Master's or Doctoral degree while maintaining a faculty ranked position at the enrolling institution.

_____ _____

Graduate School Dean Signature **Date**

G. 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 Universties (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.

IRC Section 117 permits undergraduate level tuition reduction as a non-taxable benefit to employees and dependents. 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 consult an Oregon tax professional if you have any questions regarding whether or not your dependent meets the IRS qualifications.

For more information about the Staff Fee rate contact the Human Resources office on your campus (OSU employees - contact your Business Center)

HR USE ONLY

Staff Fee Privileges: Approved Denied Notes: _____

HR Name/Signature _____/_____ University _____ Date _____

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.*