

Application For Tuition Assistance

ALL FIELDS MUST BE COMPLETED

INCOMPLETE FORMS WILL BE RETURNED TO THE APPLICANT

Procedures

Tuition reimbursement is made directly to the employee with proof of full payment to the school and successful completion of coursework.

Complete the Application for Tuition Assistance (Form 896) and obtain **group manager approval** prior to enrolling for the course(s). Obtain the approval of your Division manager in Part 1A to take a course in audit status. Retain this form until the course has been completed.

Upon completion of the course(s), forward the original Application for Tuition Assistance form to HR-T&D Tuition Assistance, MS M589. Attach **original** tuition receipts, book receipts, and grade report. **Copies will not be accepted.** Courses taken in audit status require the instructor's certification of satisfactory participation on the Form 896 in lieu of a grade report. Continuing education courses require a certificate of completion.

You will receive an electronic notification when your request has been processed by HR-T&D. Please allow at least one week from this time to receive your check in interoffice mail.

Refer to Administrative Manual 405 and the [Tuition Assistance Web-site](#) for detailed policies and procedures.



Application for Tuition Assistance

Part 1

Z Number	Name	Group	Mailstop	Phone #	
Cost Center	Program Code	Cost Account	Work Package	Course Start Date	
Level of Degree completed (<i>check one</i>)					
<input type="checkbox"/> Assoc <input type="checkbox"/> Bachelor <input type="checkbox"/> Masters <input type="checkbox"/> PhD <input type="checkbox"/> Other <input type="checkbox"/> Have not completed a degree					
Major Field of Degree completed					
Level of Degree seeking (<i>check one</i>)					
<input type="checkbox"/> Assoc <input type="checkbox"/> Bachelor <input type="checkbox"/> Masters <input type="checkbox"/> PhD <input type="checkbox"/> Other <input type="checkbox"/> Not seeking a degree					
Major Field of Degree seeking					
I have completed the following course(s) <input type="checkbox"/> for credit <input type="checkbox"/> non-credit (<i>complete Part 1A for audit</i>)					
Name of Institution	Course No.	Course Title	Tuition Cost and Fees	Book Costs	Credit hours

I am am not receiving financial assistance (scholarships, grants, VA benefits, etc) from other sources

If yes, please identify source and amount. _____

In signing, I authorize Tuition Assistance to obtain information on the terms (needs analysis) and amount of award directly from the institution to determine appropriate reimbursement.

I certify that the information provided on this application is correct and complete. In signing, I authorize HR-T&D Tuition Assistance to verify payment and transcript information directly from the educational institution.

_____ _____

Employee's Signature Date

_____ _____

Group Manager Signature Date

PART 1A-COMPLETE FOR AUDIT ONLY

Approval given for student to take course in audit status

_____ _____

Division Director Signature Date

I certify that the above individual satisfactorily participated in the above course.

_____ _____

Instructor's Signature Date

Part 2

TO BE COMPLETED BY THE EMPLOYEE AND THE GROUP MANAGER ONLY WHEN TUITION ASSISTANCE EXCEEDS \$5,250/CALENDAR YEAR

The University relies upon your true and accurate responses to the questions below in order to comply with the applicable legal requirements under federal tax laws. Any misrepresentation and/or false statements by an employee or manager may result in disciplinary action, up to and including discharge, and/or civil or criminal penalties. The University will not be liable for taxes imposed by the IRS on employee's educational expenses and may require the employee to pay any amounts including penalty and interest imposed on the University by the IRS relating to the employee's educational expenses.

Provide a brief description of the employee's current job assignment.

1. Is this education required in order for the employee to meet the minimum educational requirements of his/her present position? Yes No

2. Is the education part of a program that will qualify the employee for a new trade or business? Yes No

If the answer to 1 or 2 is "Yes", **STOP NOW**. The employee's educational assistance is subject to withholding of taxes.

3. Is the education required by the employer or by law to keep the employee's current salary or job? Yes No

If the answer to 3 is "Yes", the employee's educational assistance is not subject to withholding of taxes. Please provide further explanation and **do not** answer 4.

4. Does the course maintain or improve skills needed in the current job? **Please answer for each course.**

Course Name	Course Name	Course Name	Course Name
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Each course for which you answer "Yes" **will not** be subject to withholding of taxes. Please provide further explanation. Each course for which you answer "No" **will** be subject to withholding of taxes.

Employee signature

Date

Manager Name (*please print*)

Manager Signature

Date