

CERTIFICATION FOR TUITION WAIVER

(Must complete tuition waiver form each semester a waiver is sought)

Issued for Employee Spouse/Dom Part Dependent

Semester/Year Fall _____ Spring _____ Summer _____

Employee / Student Information (Must be fully completed)

Employee Name _____ Empl ID _____

Dept _____ Title _____ Phone _____

Employment Status Staff Faculty Retired Other _____
 full-time part-time

Student Name _____ (if different from employee) STUDENT ID _____ Dependent's Birth Date _____

College Enrolled _____ Degree Sought (or enter non-degree) _____

Number of Credit Hours to be Waived _____

Student Status Undergrad coursework Grad/Prof coursework Dual Undergrad/Grad Program

I have read and understood all provisions of the tuition waiver policy. My signature affirms that all information provided on this form is complete and true to the best of my knowledge. **(See Overview on back of form and HR Policy Manual, Compensations & Benefits IV-7a for specifics.)**

Employee Signature _____ Date _____

Supervisor's Approval Signature _____ Date _____

(supervisor's approval not needed for dependents, spouses, or domestic partners)

Please send all tuition waiver requests via email to tuition-waiver@case.edu or fax to 368-3582

For Employer Use Only

Marriage

Cert Proof Depend DP Affidavit Empl Class _____ Hire Date _____

Taxable Tuition Y or N Taxable Amount _____

Benefits Representative _____ Date _____



I certify that all of the information on the reverse side is accurate. I acknowledge the potential taxation of the tuition waiver benefit when the waiver is issued for all graduate/professional coursework OR for undergraduate coursework applied towards a graduate degree OR for graduate/professional coursework taken by a non-degree enrollee. If such coursework is deemed a taxable benefit, a pro-rated dollar amount of the tuition waiver will be added to my (the employee's) taxable income over a period of months during the semester of enrollment, and all taxes will be withheld accordingly. I hereby acknowledge my responsibility to inform the Benefits office, in writing, of any change in enrollment and/or employment status. The Benefits office will adhere to the "class drop/add/withdrawal" percentages followed by the University Registrar. I understand that the tuition waiver is for tuition only and does not cover late fees, activity fees, lab fees or any other charges.

GENERAL REQUIREMENTS

1. Official class schedule: student schedules will be checked in SIS. **A paper copy is not required.**
Waivers will not be issued for certificate programs, continuing education courses, or audited courses.
2. Completed *Certification For Tuition Waiver* form.
3. Withholdings for taxable courses (See policy for definition of taxable courses) will be made in accordance with the employee's marital status and exemptions claimed as follows: September to December for Fall, February to May for Spring and July to August for Summer. Marital status and exemptions for income tax purposes only may be changed by completing a new W-4 Form in the HR Information Management office (220 Crawford Hall)
4. Employees eligible for health insurance under the university's Benelect program are not eligible for the student health insurance program and can waive it at <http://studentaffairs.case.edu/medicalplan/student/0708/online waiver.html> or contact Student Accounts Receivable (115 Yost Hall) in order to remove the charge from their accounts.
5. Employees may apply for a tuition waiver OR a tuition reimbursement during any one semester/quarter, but not for both during the same semester/quarter.
6. Tuition waiver applications must be received by: September 30th – Fall, February 28th – Spring, July 1st – Summer. Tuition waiver applications will not be accepted beyond this deadline and the students will be solely responsible for all charges on their accounts.
7. Tuition waiver will be granted for the following semester only when the recipient is academically eligible to register. Students officially registered for the term (e.g., beyond the drop/add deadline) will have expended one semester of waiver eligibility.
8. If employment ceases prior to October 15 for Fall, March 15 for Spring or July 15 for Summer, the tuition waiver is revoked and the employee is personally responsible for the balance due to Case.

ADDITIONAL INFORMATION

For EMPLOYEES the tuition waiver is limited to 6 credit hours in the fall and spring semesters; 3 credit hours in the summer semester for all degree oriented programs, including specialized programs such as EMBA, EDM, MPOD and part-time MBA. Authorization must be obtained from supervisor for all classes. If you are taking graduate level courses and these courses are job related, an Affidavit of Qualification for Tuition Waiver Tax Exemption may be completed. Approved affidavits will be exempted from tax withholding.

For SPOUSES and DOMESTIC PARTNERS tuition waivers are available the semester following the employee's one year anniversary date. A copy of the marriage certificate or Affidavit of Domestic Partnership and Acknowledgement of Domestic Partnership Agreement must accompany this form for a first-time waiver.

Tuition waiver benefits are available only to an employee's DEPENDENT CHILDREN who qualify under IRS definitions, or to children of the employee's domestic partner who meet all the requirements in the Affidavit of Domestic Partnership for Certification of Dependent Children, who are included in the listing of dependent children on that Affidavit. Dependent children must be candidates for a degree at Case. "Proof of Dependency" must accompany this form the first semester of enrollment each academic year (usually fall semester). A new proof of dependency is required every year. Accepted forms of proof are:

- a. Copy of parents' Federal income tax return listing the child as a dependent, or
- b. Completed Case Proof of Dependency Form (for dependent children qualifying as dependents under the IRS definitions as stated in the Tuition Waiver Policy).