



Tufts University Tuition Remission Application

Has the student completed a bachelors degree?

Y N

If Yes Taxation may apply. See next pages for details.

Semester _____ Year _____ Campus/Program _____

EMPLOYEE INFORMATION

Last Name _____ First Name _____ MI _____

Street Address _____ City _____ State _____ ZIP _____

Tufts Employee/Student ID Number _____ Date of Birth (mm/dd/yy) _____ Email Address _____ Work Phone _____

Gender: Female Male Other Citizenship: US Citizen US Permanent Resident H-1B Visa holder Other

All applicants must review the policy and procedures on subsequent pages. Instructions include specifics for first time applicants and add & drop procedures for all Tufts schools.

STUDENT INFORMATION (if Employee is not the Student)

Last Name _____ First Name _____ MI _____

Student ID Number _____ Date of Birth (mm/dd/yy) _____ Relationship to Employee _____ Email Address _____

Gender: Female Male Other Citizenship: US Citizen US Permanent Resident H-1B Visa holder Other

HAS THE STUDENT: Ever taken a course at Tufts? Y N If yes, most recent enrollment? (semester/year) _____

Been admitted to a degree program at Tufts? Y N If yes, when? (mm/yy) _____ To which program? _____

Earned a degree from Tufts? Y N If yes, when? (mm/yy) _____ Degree earned? _____

COURSE INFORMATION *only required for non-matriculated (non-degree) students.*

Call #	Course #	Course Title	Instructor Signature
_____	_____	_____	_____
Call #	Course #	Course Title	Instructor Signature
_____	_____	_____	_____

I agree that the above information is accurate and true to the best of my knowledge and that I have read and understand the procedures and policies on subsequent pages.

Employee Signature _____ Date _____

Supervisor Signature (for employee application only) _____ Date _____ Supervisor Printed Name _____

This form is due to Student Services by the dates on the next page. Email: studentservices@tufts.edu It is best to email this form for proper tracking and receipt. A new application is required for every semester.

The additional pages in this document include details about the Tuition Remission benefit, and the Tax Exclusion Form, if applicable.

Questions?

- * For questions regarding **registration, tuition and billing** contact Student Services 617.627.2000
- * For questions regarding **Tuition Remission eligibility or taxation** contact Tufts Support Services 617.627.7000
- * The Full Plan Guide and details can be found on the [HR Benefits Website](#)

Tuition Remission

Eligible employees may take a course(s) or pursue a degree or certificate program at Tufts University. In addition, eligible spouses, qualified domestic partners, and dependents may participate in this program. Eligibility details can be found on the [HR Benefits Website](#).

All eligible employees and their eligible dependents interested in taking classes at Tufts University, under the guidelines of the Tuition Remission Policy, must do the following:

1. Complete the [Tuition Remission Application form](#) (required every semester)

A note to first time applicants: Additional documents are required for first time eligible dependent applicants:

* **Provide documentation to prove dependency** (e.g. birth certificate, marriage certificate, domestic partner affidavit)

* **Provide a copy of the dependent student's Social Security Card**

You may submit the aboved required documentation to TSS either via [TSS Online Request secure upload](#), via mail/campus mail/walk-in (TSS, 62-R Talbot Avenue, Medford, MA 02155, Attn: HR Tuition Remission) or via fax to TSS (617-627-7001); **email is not encrypted and therefore not advised.**

2. Send the completed [Tuition Remission Application form](#) with the required signatures to **Student Services** via email: studentservices@tufts.edu

The deadlines for submitting a Tuition Remission Application Form are as follows:

Non-Matriculated Students (non-degree):

- Fall and Spring semesters, the deadline to submit a Tuition Remission Application form is by the end of the first week of classes.
- Summer semester, the deadline to submit a Tuition Remission Application form is prior to the start of the classes.

Matriculated Students (degree):

- Fall and Spring semesters, the deadline to submit a Tuition Remission Application form is by the due date of the bill.
- Summer semester, the deadline to submit a Tuition Remission Application is prior to the first day of the classes for the session.

The Tuition Remission Application form must always be submitted to cover the tuition charge on the bill (fees are not covered). In some cases additional steps are required to register for courses. Please see the notes below for the registration process for each school/campus.

Non-Degree Students:

Must obtain instructor's approval before submitting the Tuition Remission Application form to Student Services. The instructor is certifying that space is available for the student and that the student has been accepted into the course(s). The instructor may request the student wait until the first day of classes to confirm availability.

Notes:

- Non-Degree students will not be considered eligible for Tuition Remission benefits until all appropriate signatures have been obtained and the applicable forms returned to Student Services.
- Eligible dependent children who have not been formally admitted to Tufts University may take up to two courses during the summer semester only. (Although there are two sessions, it is considered one semester.)
- Non-Degree students may pre-register for Summer Session courses only. Fall and Spring sessions are still subject to the guidelines noted above for Non-Degree students.

How to register for a course:

Non-degree Students

- AS&E (Fall and Spring): Enter course information on the Tuition Remission Application form and obtain Instructor approval to join the course via instructor signature on the form or an attached written permission from the instructor. Course information can be found on SIS at go.tufts.edu/sis. You will be registered for the course AFTER the term begins by the school's registrar office.
- AS&E (Summer): Enter course information on the Tuition Remission Application form to join the course. Instructor approval is NOT required before the start of the term. Dependent children should still register directly with the Summer Session. Registration information can be found at <http://ase.tufts.edu/summer>. The Summer Registration Fee is NOT covered by Tuition Remission.
- Fletcher (Fall and Spring): Submit a completed Tuition Remission Application form and a Cross-Registration form.
- Fletcher (Summer): Register directly with the Fletcher School and submit the Tuition Remission Application form BEFORE the term begins.
- Boston and Grafton (All Terms): Register directly with the appropriate Registrar and submit the Tuition Remission Application form BEFORE the term begins.

Degree Students

- Any student who has matriculated into a program will register with their classmates.

How to drop a course:

Tuition Remission students are subject to the deadlines and procedures of their respective Registrar or the Summer Session. Contact the appropriate office before the term begins for drop dates and instructions.

**For questions regarding Registration, Tuition and Billing contact [Student Services](#):
studentservices@tufts.edu or 617-627-2000**

Tax Exclusion (applies to employees only)

Employees with a bachelor's degree who enroll in any Combined UG/Graduate level course(class # higher than 99) are automatically enrolled in the Graduate level of the course by Student Services.

Employees seeking tax exclusion from **graduate level courses which they claim to be job-related** must submit a completed [Tuition Remission Tax Exclusion Form \(pg. 4 below\)](#) and send it Student Services along with their completed Tuition Remission Application form (pg. 1). This form (and a copy of course descriptions) is required for TSS approval in order to be excluded from any tax liability.

QDP / Spouse Taxation

All courses taken by a qualified domestic partner and graduate level courses taken by a spouse are taxable to the employee.

Please review the Taxation Guidelines to understand the impact of Federal/State taxes of this benefit (pg. 5). Tuition Remission Program Guide on the [HR Benefits Website](#)

**For questions regarding eligibility or taxation contact [Tufts Support Services](#):
tss@tufts.edu or 617-627-7000**

The information and links on this page provide a brief overview of the Tuition Remission Program. If there are any inconsistencies between the information provided on this site and the plan's legal documents, the latter will always govern.

Tufts University Tuition Remission Tax Exclusion Form

Employees with a bachelor's degree who enroll in any Combined UG/Graduate level course(class # higher than 99) are automatically enrolled in the Graduate level of the course by Student Services.

Employees seeking tax exclusion from **graduate level courses** which they claim to be **job-related** must submit a completed Tuition Remission Tax Exclusion Form and send it Student Services along with their completed Tuition Remission Application form (pg. 1). **Additionally, a course description MUST accompany the completed Tuition Remission Tax Exclusion form. Course information can be found on SIS: go.tufts.edu/sis. COPY / PASTE COURSE DESCRIPTION HERE:**

EMPLOYEE INFORMATION

Last Name	First Name	MI
_____	_____	_____
Tufts Employee / Student ID Number	Current Job Title	Work Phone
_____	_____	_____

COURSE INFORMATION

Call #	Course #	Course Title	Semester	Year
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Please explain why you believe the course(s) is (are) job related to your current position at Tufts:

I certify that the courses are (1) Job-Related, (2) Do not meet the minimum requirements of my current position, and (3) Do Not train me for a new profession.

Employee Signature	Date	
_____	_____	
Supervisor's Signature	Supervisor's Printed Name	Date
_____	_____	_____

This form and required documentation are due to Student Services by the dates on the previous pages. Please submit via email: studentservices@tufts.edu A new application is required for every semester.

Questions?

* For questions regarding **registration, tuition and billing** contact **Student Services** 617.627.2000

* For questions regarding Tuition Remission **eligibility** or **taxation** contact **TSS** 617.627.7000

TSS USE ONLY	
Approved	Denied
TSS Signature:	
Date:	

Tufts University
Tuition Program Taxation Guidelines for Classes Taken at Tufts

Who is Covered	What Tufts Provides	Comments
<p>Benefits Eligible Employee</p> <p>You are an eligible employee if, as of the first day of the semester, you have been continuously employed as a benefits eligible employee for at least three months as of the first day of the semester and are in one of the following employee classifications:</p> <ul style="list-style-type: none"> ✓ Exempt or Non-Exempt Employee regularly scheduled to work 17.5 hours or more a week; or ✓ Faculty Member with at least a half time, two-semester appointment. (Half time generally means a regularly scheduled teaching load of at least three courses per academic year.) 	<p>Full Time Eligible Faculty or Staff: Two courses per semester; graduate or undergraduate taken at Tufts University.</p> <p>Half Time Eligible Faculty or Part Time Staff: One course per semester; graduate or undergraduate taken at Tufts University.</p>	<p>Undergraduate courses for employees are excluded from Federal and State taxes under IRC §117(d).</p> <p>Graduate courses for employees are excluded from Federal and State taxes if the course is considered job related under IRC §132(f). (See definition below).</p> <p>Non Job Related Graduate courses for employees are 100% State taxable.</p> <p>Non Job Related Graduate courses for employees are excluded from Federal taxes up to \$5,250.00 per calendar year.</p> <p>Education or training must be job related in order to be excluded from the employee's income under §132.</p> <p><u>Expenses are job related if the education is necessary to:</u></p> <ul style="list-style-type: none"> • Maintain or improve skills required in employees job • Meet express requirements of the employer or the requirements of law imposed as a condition to retaining job status or employment <p><u>Expenses are not job related if the education:</u></p> <ul style="list-style-type: none"> • Is needed to meet minimum requirements of employee's present or intended job • Is undertaken to fulfill general education aspirations or [is part of a program of study that will qualify you for a new trade or business]
<p>Spouse or Quailified Domestic Partner of an eligible employee, as defined above.</p>	<p>Spouses/Quailified Domestic Partner: One course per semester; graduate or undergraduate taken at Tufts University</p>	<p>All courses for qualified domestic partners are 100% Federal and State taxable to the employee.</p> <p>Undergraduate courses for spouses are excluded from Federal and State taxes under IRC §117(d). Graduate courses for spouses are taxable to the employee.</p>
<p>Dependent Child(ren) of a full time benefits eligible employee (as described above) and the dependent child(ren) of the employee's spouse or qualified domestic partner are eligible to receive tuition remission benefit, so long as the employee has been:</p> <ul style="list-style-type: none"> ✓ Employed for at least five (5) consecutive years as a full time benefits eligible employee at the beginning of the semester the employee is applying for benefits. 	<p>Dependent Children (matriculated): : four years of undergraduate study in a program at Tufts University. No graduate courses allowed.</p> <p>Dependent Children (non-matriculated): who have not been formally admitted to Tufts University may take up to two (2), undergraduate level courses, in a non-degree status during the summer semester only. No graduate courses allowed.</p>	<p>Undergraduate courses for dependent children of benefits eligible employees (and their spouses dependent children) are excluded from Federal and State taxes under IRC §117(d)</p> <p>Undergraduate courses for dependent children of qualified domestic partners are Federal and State taxable to the employee.</p>