



# Tufts University Tuition Remission and Tax Exclusion Application

Semester

Year

Campus/Program

**Does the person applying for the tuition remission benefit have a bachelor's degree?**

**If yes, taxation may apply.**

- If you are an employee and are seeking tax exclusion from graduate level courses which are job-related must apply for tax exclusion. To do so, please complete Section V of this document. This is required every semester.
- All courses taken by a qualified domestic partner and graduate level courses taken by a spouse are taxable to the employee.
- Please review taxation guidelines on the Tuition and Remission website: <https://access.tufts.edu/tuition-reimbursement-and-remission>

## Section I: EMPLOYEE INFORMATION

|                           |  |
|---------------------------|--|
| Last Name                 |  |
| First Name                |  |
| MI                        |  |
| Street Address            |  |
| City                      |  |
| State                     |  |
| ZIP                       |  |
| Tufts Employee/Student ID |  |
| Date of Birth             |  |
| Email                     |  |
| Work Phone                |  |
| Gender                    |  |
| Citizenship               |  |

**Is the student the same as the employee?**

*If no, please complete Section II: Student Information.*

**Section II: STUDENT INFORMATION (if student is not employee)**

|                          |  |
|--------------------------|--|
| Last Name                |  |
| First Name               |  |
| MI                       |  |
| Date of Birth            |  |
| Email                    |  |
| Relationship to Employee |  |
| Gender                   |  |
| Citizenship              |  |

**Section III: ENROLLMENT INFORMATION**

|  |  |
|--|--|
| <b>Has the student ever taken a course at Tufts? (yes/no)</b>                      |  |
| <b>If yes, please list most recent enrollment (semester/year)</b>                  |  |
| <b>Has the student been <u>admitted</u> to a degree program at Tufts? (yes/no)</b> |  |
| <b>If yes, which program?</b>  |  |
| <b>Has the student earned a degree from Tufts? (yes/no)</b>                        |  |
| <b>If yes, when (mm/yy)</b>  |  |
| <b>If yes, please provide the degree earned</b>                                    |  |

**Non-Matriculated/Non-Degree Students, please continue to SECTION IV: COURSE INFORMATION**

**Matriculated students, please continue to SECTION V: TAX EXCLUSION**

**Section IV: COURSE INFORMATION (only required for non-matriculated/non-degree students)**

**Please note that you will need the signature of your instructor(s).** 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 to wait until the first day of classes to confirm availability.

**Course 1:**

|                       |  |
|-----------------------|--|
| Call #                |  |
| Course #              |  |
| Course Title          |  |
| Instruction Signature |  |

**Course 2:**

|                       |  |  |
|-----------------------|--|--|
| Call #                |  |  |
| Course #              |  |  |
| Course Title          |  |  |
| Instruction Signature |  |  |

**Section V: TAX EXCLUSION**

**If you are an employee and are seeking tax exclusion from graduate level courses which are job-related, you must apply for tax exclusion.** This is required every semester.

**Do you wish to apply for tax exclusion?**

**If you are not seeking tax exclusion** for job-related, graduate -level courses, please move to **Section VII: SIGNATURES.**

If you are **seeking tax exclusion** for job-related, graduate -level courses, please continue to **Section VI: COURSE INFORMATION FOR TAX EXCLUSION**

**Section VI: COURSE INFORMATION FOR TAX EXCLUSION**

**Current JOB TITLE:**

**Course 1:**

|   |  |
|---|--|
| Call #  |  |
| Course #  |  |
| Course Title  |  |
| Course Description – a course description must be included. Please copy and paste from SiS:<br><a href="http://go.tufts.edu/sis">go.tufts.edu/sis</a> |  |
| Please explain how this course is related to your current position.   |  |

**Course 2:**

|   |  |
|---|--|
| Call #  |  |
| Course #  |  |
| Course Title  |  |
| Course Description – a course description must be included. Please copy and paste from SiS:<br><a href="http://go.tufts.edu/sis">go.tufts.edu/sis</a> |  |
| Please explain how this course is related to your current position.   |  |

**Section IV: SIGNATURES**

**SIGNATURES FOR TUITION REMISSION**

EMPLOYEE SIGNATURE

DATE

***FOR EMPLOYEE APPLICATIONS ONLY***

SUPERVISOR NAME (printed)

SUPERVISOR SIGNATURE

DATE

**SIGNATURES FOR TAX EXCLUSION**

**Please read carefully:** 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. A course or degree program which prepares you for a future job at Tufts or elsewhere does not qualify as job-related.

EMPLOYEE SIGNATURE

DATE

***FOR EMPLOYEE APPLICATIONS ONLY***

SUPERVISOR NAME (printed)

SUPERVISOR SIGNATURE

DATE

**SUBMISSION**

**Email completed Tuition Remission and Tax Exclusion Form to: [TSS@tufts.edu](mailto:TSS@tufts.edu)**

**TSS USE ONLY**

|          |  |
|----------|--|
| APPROVED |  |
| DENIED   |  |

## TUITION REMISSION AND TAX EXCLUSION FORM

### PLEASE READ CAREFULLY PRIOR TO COMPLETING THE TUITION REMISSION AND TAX EXCLUSION FORM

- 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 Tuition Remission Access Tufts page.

**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) – *see note on first-time Dependent Applicants*
2. Send the completed Tuition Remission Application with required signatures to [TSS@tufts.edu](mailto:TSS@tufts.edu)
3. If you are seeking a tax exclusion for a graduate-level, job-related course, complete the Tuition Remission Tax Exclusion Form (required every semester). It **MUST** be submitted at the same time as the Tuition Remission Application. Send both forms to [TSS@tufts.edu](mailto:TSS@tufts.edu)

### NOTE: FIRST-TIME DEPENDENT APPLICANTS

Employees must provide documentation to prove dependency (birth certificate, marriage certificate, or Affidavit of Qualified Domestic Partnership) to TSS at [TSS@tufts.edu](mailto:TSS@tufts.edu)

### DEADLINES

#### Non-matriculated Students (non-degree)

| Semester                 | Submission Deadline for Tuition Remission and Tax Exclusion |
|--------------------------|---|
| Fall and Spring Semester | By the end of first week of classes                         |
| Summer Semester          | Prior to the start of classes                               |

#### Matriculated students (degree)

| Semester                 | Submission Deadline for Tuition Remission and Tax Exclusion |
|--------------------------|---|
| Fall and Spring Semester | Due Date of the bill  |
| Summer Semester          | Prior to the first day of the classes for the session       |

### Non-Degree Students

Must **obtain instructor's approval before submitting the Tuition Remission Application** form to [TSS@tufts.edu](mailto:TSS@tufts.edu)

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.

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.

## ADDITIONAL INFORMATION

- 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-matriculated Students (non-degree)

| Campus/Semester                | Course Registration Process  |
|--------------------------------|--|
| AS&E (Fall and Spring)         | <ul style="list-style-type: none"><li>• 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 <a href="http://go.tufts.edu/sis">go.tufts.edu/sis</a></li><li>• You will be registered for the course AFTER the term begins by the school's registrar office</li></ul>                 |
| AS&E (Summer):                 | <ul style="list-style-type: none"><li>• Enter course information on the Tuition Remission Application form to join the course. Instructor approval is NOT required before the start of the term.</li><li>• Dependent children should still register directly with the Summer Session. Registration information can be found at <a href="http://ase.tufts.edu/summer">http://ase.tufts.edu/summer</a>.</li><li>• The Summer Registration Fee is NOT covered by Tuition Remission.</li></ul> |
| Fletcher (Fall and Spring)     | <ul style="list-style-type: none"><li>• Submit a completed Tuition Remission Application form and a Cross-Registration form.</li></ul>   |
| Fletcher (Summer)              | <ul style="list-style-type: none"><li>• Register directly with the Fletcher School and submit the Tuition Remission Application form BEFORE the term begins</li></ul>  |
| Boston and Grafton (All Terms) | <ul style="list-style-type: none"><li>• Register directly with the appropriate Registrar and submit the Tuition Remission Application form BEFORE the term begins.</li></ul>   |

### 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.

## QUESTIONS

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



## TAX EXCLUSION GUIDELINES

(applies to employees ONLY)

**Please note:** 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.

### PROCESS

Employees seeking tax exclusion from graduate level courses which they claim to be job-related must submit a Tuition Remission Application and the Tuition Remission Tax Exclusion Form (required documentation) via email to: [TSS@tufts.edu](mailto:TSS@tufts.edu) by the deadlines below.

### DEADLINES

#### Non-matriculated Students (non-degree)

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|--------------------------|---|
| Fall and Spring Semester | By the end of first week of classes                         |
| Summer Semester          | Prior to the start of classes                               |

#### Non-matriculated Students (non-degree)

| Semester                 | Submission Deadline for Tuition Remission and Tax Exclusion |
|--------------------------|---|
| Fall and Spring Semester | Due Date of the bill  |
| Summer Semester          | Prior to the first day of the classes for the session       |

If the Tuition Remission Tax Exclusion Form is not received by the stated deadline, the course will be deemed taxable to the employee.

The Tuition Remission Tax Exclusion Form is required every semester for TSS approval to be excluded from any tax liability if applicable.

### 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.

For questions regarding eligibility or taxation,  
contact Tufts Support Services: [TSS@tufts.edu](mailto: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.*