

OREGON UNIVERSITY SYSTEM STAFF FEE PRIVILEGES AND TRANSFERRED STAFF FEE PRIVILEGES QUESTIONS & ANSWERS

These frequently asked questions, combined with the information located on pages three and four of the Staff Fee Privileges Approval Form, will answer most questions about the Staff Fee Privileges Benefit available to eligible OUS staff and family members. Please see updateable online Approval Form at the following: <http://www.ous.edu/dept/hr/benefits/stafffee.php>

For additional information, contact your campus Human Resources Office.

- Approval Forms for family members should be submitted to the employee's Human Resources office **two weeks prior to the start of classes.**
- Staff members may submit their Approval Forms up to **two days prior to the start of classes.**

Human Resources offices will send all approved staff fee forms to the campus enrollment offices before the first day of classes. The universities reserve the right to deny staff fee rates for late submission of approval forms. Denials may be appealed to the university.

1) What are Staff Fee Privileges and who is eligible to use them?

Oregon University System employees appointed at half time or more (not including temporary employees, graduate assistants, and other student employees) may register for courses offered by OUS universities, at special rates, for a maximum of twelve (12) hours of credit per term. Course enrollments must be approved by an employee's supervisor or manager and may not take precedence over the performance of an employee's duties.

2) Are staff members required to submit Staff Fee Approval Forms prior to the first day of classes when taking classes themselves?

Yes. The expected number of enrollments by staff and eligible family members each term requires a cutoff date to adequately complete processing. The deadline for *staff* members to submit Staff Fee Approval Forms is two days prior to the start of classes.

3) I am a faculty ranked employee of the Oregon University System. May I use the Staff Fee Benefit to pursue an advanced degree at the campus where I am employed?

Yes. However, please note that in order to comply with Oregon Administrative Rule 580-020-0005, employees with faculty ranking are required, every term, to obtain signed approval from the employing institution's Graduate School, before requesting verification through Human Resource, if the employee is seeking to pursue an advanced degree *at the campus where employed.*

4) Must I get my department's approval to use Staff Fee Privileges?

Yes. Your department or supervisor must approve your use of Staff Fee Privileges to ensure that your department and job duties will not be affected by the number of credit hours you request.

5) What is the staff fee rate for tuition?

Tuition and, consequently, staff fee rates vary by campus. The staff fee rate is 25% of the resident undergraduate or graduate tuition rate, rounded to the nearest dollar. Semester rates, where applicable, are calculated based on adjusted term rates and rounded to the nearest dollar.

You will need to confirm the staff fee rate for classes with the tuition assessor's office at the campus where classes are taken. Additional information about staff fee rates is located in the current Academic Year Fee Book posted online at the following URL: <http://www.ous.edu/factreport/tuition/>

6) Do I have to pay all of the fees students normally pay if I use my Staff Fee Privileges myself?

Staff members are required to pay:

- Technology Fees based on the number of credit hours taken;
- Matriculation Fee for admitted students (does not apply to Community Education programs);
- Study Resource Fees;
- Course-specific fees (described in the host university's schedule of classes);
- Late Registration and Change of Registration Fees (described in the university's Schedule of Classes);
- Energy surcharges, subject to the rules of the university where classes are taken.

Staff members are not required to pay:

- Building Fees;
- Health Service Fees;
- Incidental Fees.

7) May I use Staff Fee Privileges to take classes at more than one university in the same term?

Yes. If you are taking classes at more than one campus during a term, you may use Staff Fee Privileges at each one, subject to each university's tuition rate and other applicable rules. If you take more than 12 hours of classes, however, your employing (home) institution, accepts staff fee rates first, and the non-employer (host) institution will charge you regular tuition rates for classes in excess of those covered by staff fees.

8) If I take a combination of graduate and undergraduate level courses, how is the staff fee determined?

To provide the highest value for Staff Fee Privileges, graduate level courses are offset by the staff rate first, before the staff fee rate is applied to undergraduate courses.

9) If I use Staff Fee Privileges, may I also audit courses?

Yes. Staff members may audit courses in addition to using Staff Fee Privileges. Institutions are required to maintain a record of courses audited, and staff members must indicate audited courses on the Staff Fees Privileges Approval Form when auditing in conjunction with other courses at staff fee rates.

Transferring Staff Fee Privileges to a Family Member

10) What is the staff rate for tuition benefits available to a family member?

A qualified family member may take up to twelve (12) credit hours per term at the staff instructional fee (tuition) rate of 25% of the resident undergraduate tuition rate, rounded to the nearest dollar, for both undergraduate and graduate credits, plus other applicable fees. Important note: Instruction rates vary by teaching institution and should be confirmed with the institution where classes will be taken.

11) How does the OUS define a family member?

For the purposes of transferring staff tuition rates, a family member is defined by OUS as a spouse, dependent child of the employee, domestic partner, or dependent child of a domestic partner.

12) How does the university determine whether my family member is eligible for the staff tuition rate?

You must certify that your family member is eligible on the Staff Fees Approval Form. For a spouse, you certify that you are legally married; for a domestic partner, you complete and submit an Affidavit of Domestic Partnership with the initial Staff Fee Approval Form; for a dependent child, you certify that the child qualifies as your dependent, or the dependent of your domestic partner, for tax purposes. You may be required to submit proof to support your certification as requested by the university.

13) Who qualifies as a “dependent” for purposes of receiving transferred staff fees?

Staff Fee Privileges are transferable to dependents of the employee or domestic partner as defined in Internal Revenue Code Section 152. The Codes generally define a dependent, or “qualifying child,” as a son, stepson, daughter, or stepdaughter of the taxpayer who meets the following three requirements:

- The dependent has the same residence as the taxpayer for more than half the tax year.
- The dependent is age 23 or younger at the close of the calendar year.
- The dependent has not provided over half of their own support.

Note: IRC Section 152 describes two types of dependents: one is a "qualifying child" and the other is a "qualifying relative." As long as a child of the employee or domestic partner is no older than age 23 by the end of the calendar year, is a student, and meets IRS relationship, residency, and support requirements, the dependent is considered a "qualifying child" for tax purposes. Additionally, a child of the employee or domestic partner, who is a student, is not disabled, and who attains the age of 24 during the calendar year is considered a "qualifying relative." A “qualifying relative” is a considered a dependent of the employee or domestic partner so long as the same IRS relationship, residency, and support elements for tax purposes remain the same. Please consult an Oregon tax professional if you have any questions regarding whether or not your dependent meets the IRS qualifications.

14) I have a stepson and I personally have no custodial rights, but my wife does and we list him as a dependent on our taxes. Does he qualify?

11) Yes. As long as your stepson qualifies as your dependent child for tax purposes, the child is your dependent and considered eligible for purposes of this program.

15) Is my child eligible to use the Staff Fee Privileges to enroll in university classes while still in high school?

Yes. If your dependent child meets the enrollment requirements of the university where classes are taken, your transferred Staff Fee Privileges may be used, up to 12 credit hours, to reduce tuition.

16) May I transfer my benefit to more than one family member during a given term?

No. Staff fee benefits may not be subdivided among family members during a term.

17) If I allow a family member to use my staff rate, may I also use it the same term?

No. A maximum of twelve (12) hours per term may be used, and the benefit may not be subdivided between the employee and family members during a term.

18) If I transfer my staff rate for tuition benefit to one of my family members for one term, can I use it myself the next term?

Yes. You will need to complete a new approval form each term or semester and may change the qualified recipient each term or semester.

19) May I transfer my benefit to a family member to use at another Oregon University System institution? If yes, which form do I use and where can I get the form?

Your family member may use your staff fee privilege at any of the Oregon System public universities with the exception of Oregon Health and Sciences University. The same approval form is used by all Oregon University System campuses and can be printed directly from the OUS website at <http://www.ous.edu/dept/hr/benefits/stafffee.php>. You may also pick up an Approval Form at your campus Human Resources office.

20) My spouse and I both work for the Oregon University System. May we combine our staff fee privilege so our child would receive 24 credit hours at staff tuition rate?

No. An employee or transferee may use staff fee benefits only once per academic term, limited to twelve (12) academic credits per term.

21) My son and I both work for the Oregon University System. May I transfer my staff fee privilege to him, so he can transfer his staff fee privilege to his own dependent child?

No. An employee or transferee may use the staff fee privileges only once per academic term or semester, limited to twelve (12) academic credits per term.

22) If I transfer my staff fee privileges, will it affect financial aid for my family member?

The value of the reduced tuition is considered a resource available to the family member and is added into the calculations for determining the total financial aid package. It may affect the type of award or amount of award given. Contact the campus financial aid office for more information.

23) Do staff rates apply if the person enrolling in classes has not met residency requirements?

Yes. OUS employees who work at least half-time as well as eligible family members, may enroll as students at campus resident fee rates. Staff fee privileges are not affected by residency.

24) Must family members pay all of the fees students normally pay?

12) Yes. Staff fee privileges reduce only tuition amounts. Except for courses taken on audit status, all applicable student fees are charged to eligible family members using the transferred benefit.

25) May staff fee privileges be used for "on-line" classes?

Yes. Generally, on-line courses are treated the same as other classes. How a class is delivered is not a question that determines whether specific classes are included or excluded within a given program. Certain Distance Education classes as well as other classes excluded from the reduced tuition benefit are identified on the list of excluded programs at the following URL:

http://www.ous.edu/dept/hr/files/Excluded%20Programs_rev_June%2022%202007.pdf

26) May a family member audit courses?

Yes. Eligible family members may audit courses in addition to using transferred staff fee privileges during a term. Only one person in a family, including the staff member, may audit or use staff fee privileges during a term or semester. Because universities track workload for audited courses, family members must provide a completed Staff Fee Privileges Approval form to the campus Human Resources Office in order to audit classes. Space availability and the instructor's approval are required just as they are for staff members.

27) Are fees assessed to staff or family members/domestic partners who audit courses?

No. There is no fee assessed to audit a course.

28) For a non-resident, how are staff fees calculated?

Staff fee rates for up to 12 credit hours per term are based on resident, undergraduate rates for eligible non-resident family members. A non-resident qualified family member or same-sex domestic partner enrolled for more than twelve (12) credits per term or semester pays the campus *non-resident rates* for credits in excess of the allowable credit hours.

29) As an employee, do I have to complete a form each term or semester to request that my staff rate for tuition benefit be transferred to a family member?

Yes. The Staff Fee Privileges Approval Form for Staff and Family Members must be completed each term. You can print the form directly from: <http://www.ous.edu/dept/hr/benefits/stafffee.php> Family members' completed approval forms must be submitted to Human Resources at least two (2) weeks before the **first day** of classes to ensure enrollment offices have them prior to the start of each term. When enrolling for undergraduate courses, the approval form may be turned in before a family member officially registers for classes.

30) Must I get my department's approval to transfer my staff fee privileges to my family member?

No. You do not need department or supervisor approval to transfer staff fee privileges.

31) Are there any exceptions to the requirement to have completed application for Staff Fee Privileges before the first day of classes?

Staff members and their family members are required to adhere to the enrollment deadlines when they are applying to host institutions (universities other than the staff members' employer). The rules of their employing (home) institution apply when classes are taken at the staff member's home institution. *The universities reserve the right to deny staff fee rates for late submission of approval forms. Denials may be appealed to the university where classes are taken.*

Domestic Partner Questions

32) I am transferring my staff fee privileges to my domestic partner. How does withholding work in this case?

The dollar value of the tuition reduction is reported to your employing university, and taxes are withheld based on this "imputed income." You do not see the tuition reduction as an increase in your paycheck; the tax withholding for the value of the benefit is all that is shown. State and federal income taxes, plus Social Security withholding, is taken on the value of the benefit for both undergraduate and graduate tuition for your domestic partner. Same-sex domestic partners who take undergraduate classes are not subject to Oregon income tax on the imputed value of the benefit. The OUS will provide the amount of the imputed income withheld on the employee's W-2 form. The employee is advised to seek tax advice regarding how to claim the associated Oregon income reduction.

33) Are my domestic partner's children eligible to take classes at staff rates?

Yes. Your domestic partner's children are eligible if they are considered your domestic partner's dependents for tax purposes. You will pay state and federal withholding on the imputed value of the tuition benefit for both undergraduate and graduate tuition for a dependent child who is the natural or adopted child of your domestic partner. However, if your domestic partner's child is also your child, or if you have adopted the child and are able to claim the child as a dependent on *your* tax return the tuition benefit is not taxed.