



**EMPLOYEE TUITION ASSISTANCE BENEFIT**  
(Return to the Office of Human Resources)

Employee Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Employee Date of Hire: \_\_\_\_\_ Dept: \_\_\_\_\_

Student Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Spouse  Dependent Child Age: \_\_\_\_\_

Dependent verification attached?  Yes  No  On File Year: \_\_\_\_\_

Undergraduate  Graduate

SEMESTER Fall: \_\_\_\_\_ Spring: \_\_\_\_\_ Summer: \_\_\_\_\_

1<sup>st</sup> Course Title: \_\_\_\_\_ Course no: \_\_\_\_\_

Credits: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ Course Schedule: Days: \_\_\_\_\_ Time: \_\_\_\_\_

2nd Course Title: \_\_\_\_\_ Course no: \_\_\_\_\_

Credits: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ Course Schedule: Days: \_\_\_\_\_ Time: \_\_\_\_\_

**ADDITIONAL COURSES PAID BY THE EMPLOYEE:**

TITLE: \_\_\_\_\_ CREDITS: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

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**TUITION BENEFIT DOES NOT INCLUDE ANY ADDITIONAL FEES**

Employees must file the FASA form and apply for all state grants for which they may be eligible.

**APPROVALS:**

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

FA Director: \_\_\_\_\_ Date: \_\_\_\_\_

HR Director: \_\_\_\_\_ Date: \_\_\_\_\_

FA Awards: Federal Grants:\$ \_\_\_\_\_ State Grants: \$ \_\_\_\_\_

Entered by: \_\_\_\_\_ Reference no: \_\_\_\_\_ Date: \_\_\_\_\_

*Please review policy statement on reverse side of this form.*

Trinity College employees may take courses offered at Trinity College, if the employee meets all eligibility requirements under academic and employment policies.

**All employees/students are required to apply for any and all available federal and state assistance and grant aid, such aid will be credited against this tuition benefit.**

**Trinity College reserves the right to amend or change this policy statement without cause or notice to employees. Nothing in this policy statement precludes Trinity College from entering into a specific agreement with employees in the exercise of this benefit.**

**An employee may exercise this tuition benefit to a grand total of three degrees. "Grand total" includes degrees earned by eligible spouses and dependents.**

**TUITION BENEFITS FOR STAFF:**

**GENERAL PROVISIONS:**

1. All tuition benefits apply only to tuition for courses offered at Trinity College. Laboratory and other additional fees must be paid by the employee.
2. The employee/student must meet admission requirements and is subject to all academic rules, regulations, and fees.
3. Employees may not take classes during normally scheduled working hours. Any exception to this policy must have prior approval by both the department supervisor and the Director of Human Resources.
4. Because of the demands of the workplace, employees may not take courses or programs that require internships, student teaching, or other extended absence during the workday. Exception to this policy must be petitioned to the Director of Human Resources and approved by the President.
5. In the event of termination of employment or transfer to an ineligible status, the employee/student becomes ineligible for tuition benefits. Financial adjustments will be made on the student's account on a pro-rated basis through the end of the course period.
6. Employees may take courses on a space available basis.
7. A tuition assistance application must be completed and have appropriate approval signatures *prior to the start of the semester*. A tuition assistance application must be completed for each semester.
8. Employees will be responsible for any tax liabilities in accordance with Internal Revenue Service regulations. Additional information.

**TUITION ASSISTANCE APPLICATION:**

Forms are available in the Office of Human Resources (Main B-15)

**CREDIT BANK**

Employees earn tuition assistance benefits based on years of employment with Trinity, and these benefits constitute as credit bank' against which the employee may draw benefits so long as he or she is employed with Trinity. The credit bank is extinguished when the employee no longer works at Trinity. Credit bank accumulation is as follows:

# of Years of Employment	# of Credits Earned Per Year of Employment	Total Accumulation at the end of the period
1-3	24	72
4-6	30	162
7-10	36	270
10+	40	384 maximum (3 BA degs.)

Personnel employed with Trinity prior to January 1, 2002, will have their prior years of service credited toward this credit bank, and prior tuition benefits will also be debited from the bank.

The accumulated credits apply *only* to the tuition of the employee or covered dependents or spouse, and may not be transferred to any other individual.

Once the accumulation is used-up, the credit bank is not renewable.

**ELIGIBILITY:**

Regular full-time staff are personally *eligible for tuition benefits the semester following the required waiting period.*

Regular half-time and part-time staff are not eligible for tuition benefits.

**COVERAGE:**

**Regular Full-Time Staff** who meet the eligibility criteria will receive tuition benefits for two courses per semester for a maximum of six credit hours per semester.

**TUITION BENEFITS FOR SPOUSES/DEPENDENTS OF STAFF:**

Spouses and legally dependent children of Full-Time Staff are eligible for tuition benefits as follows:

**General Provisions:**

1. All tuition benefits apply only to tuition for courses offered at Trinity College. Laboratory and other additional fees must be paid by the employee.
2. The student/spouse must meet admission requirements and is subject to all academic rules, regulations, and fees.
3. In the event of termination of employment or transfer to an ineligible status, the employee/student becomes ineligible for tuition benefits. Financial adjustments will be made on the student's account on a prorated basis through the end of the examination period.
4. Spouses and dependents may take courses on a space available basis.
5. A tuition assistance application must be completed for each semester with appropriate approval signatures, prior to the start of the semester.
6. A dependent child must be the natural or legally adopted child or step-child of the employee. The child must be legally dependent upon the employee for support as defined by the Internal Revenue Service statutes. The employee must provide supporting documentation.
7. This benefit shall not apply to legally separated or divorced spouses.
8. All spouses and dependents are required to apply for any and all available federal and state assistance and grant aid and such aid will be credited against this tuition benefit.

**TUITION ASSISTANCE APPLICATION:**

Forms are available in the Office of Human Resources (Main B-15)

**TAX RESPONSIBILITY:**

**Employees will be responsible for any tax liabilities in accordance with Internal Revenue Services regulations.**

**To see if your benefit is taxable, please follow the chart below:**

Receives Benefit	Course Work	Taxable Amount to EE
Employee	Undergraduate	Not taxable
Spouse	Undergraduate	Not taxable
Dependant	Undergraduate	Not taxable
Employee	Graduate	Amount above \$5,250 in one calendar year- Taxable
Spouse	Graduate	Taxable, Full Amount
Dependant	Graduate	Taxable, Full Amount

**Taxable tuition amounts will be added to employees' taxable income at the end of the calendar year prior to the W-2 processing. If you have any questions concerning your benefit and the taxable status, please contact the Office of Human Resources.**

**DEFINITIONS:**

Space Available means that tuition will be remitted only if the course has otherwise enrolled the minimum number of students for the course to be offered; another section will not be opened to satisfy this benefit.

Non-cumulative benefit means that if this benefit is not used in any given semester that it may not be accumulated. This benefit has no cash value.

Half-time means any employee working 20-34 hours per week.

Part-time means any employee working under 20 hours per week.

To enable employees to realize these tax advantages, Trinity provides two types of tuition assistance benefits: one is under a plan offered in compliance with Internal Revenue Code § 117(d), and the other follows Internal Revenue Code § 127. (See employee's handbook for details)