

IU Fee Courtesy Plan Enrollment Form
Eligible IU Employees and Covered Dependents

In order to avoid being billed for full tuition, employees are encouraged to submit this form well before the beginning of the academic year each fall. If this enrollment form is processed after the student is billed for tuition, the Fee Courtesy award becomes a reimbursement after the student has paid all tuition. If applying retroactively, enrollment forms cannot be accepted after December 31 of the year in which the academic year ended.

Employee Information: To be completed by the employee after reading the reverse side.

Employee Name: Last First Middle

Employee ID#: (printed on paycheck stub)

Employee Home Address: Number, Street and Apt # City State Zip

Home Phone# Campus Phone# Email Address:

Recipient (check one): Employee Spouse (Marriage Date:) Registered Domestic Partner* Dependent Child* Dependent Child of a Domestic Partner*

* Documentation to verify the relationship of a spouse, domestic partner, or dependent child (marriage certificate, birth certificate, domestic partner affidavit) is required with this enrollment form unless such documentation has been previously submitted. Please indicate that either you: are submitting documentation with this enrollment form, or have previously submitted such documentation to Human Resources

Student Information:

Student Name: Last First Middle

University ID#:

Student Home Address: Number, Street and Apt # City State Zip

Campus of Enrollment: Name of Graduate Program, if applicable:

I am applying for the Fee Courtesy benefit for (check all that apply): Fall Semester 2009 Spring Semester 2010 Summer Sessions 2010 NOTE: Only 1 form will need to be submitted per academic year.

Are you enrolling in Independent Study? Yes No (NOTE: this does not include graduate level independent study research courses)

If you will only be enrolled in Independent Study courses through IU School of Continuing Studies (SCS), please check here:

Complete the following for Dependent Child Fee Courtesy:

- Will the dependent: graduate from high school before the above period(s)? complete a baccalaureate degree before the above period(s)? be married? meet the IRS Support Test and be claimed as a Federal Income Tax Dependent? Yes No

Birth Date of Dependent: / / Dependent's age:

Student and Employee Affirmations:

Student Affirmation. I affirm that all information submitted as a part of, and in support of, this application is complete and correct. I further acknowledge that the Fee Courtesy benefit may be reduced or canceled should my eligibility change. I agree to pay all IU credit hour fees that are not covered by the Fee Courtesy program.

STUDENT'S SIGNATURE: DATE:

Employee Affirmation. I affirm that all information submitted as a part of, and in support of, this application is complete and correct, including the student information section of the application, and understand that a false declaration may result in disciplinary action up to and including termination of employment at Indiana University. If I am found to be ineligible for any Fee Courtesy that I have received, I agree to pay the amount of fees owed to the university. I expressly consent to the withdrawal or deduction from my paycheck of the amount of fees for which I have been found ineligible for Fee Courtesy and which I have not paid within the timeframe specified by the Office of the Bursar.

EMPLOYEE'S SIGNATURE: DATE:

Please read information BEFORE completing the application form on the reverse side.

Eligibility

Employee Fee Courtesy

By the end of the first week of classes for the semester or first summer session, the employee must be one of the following:

- A full-time Staff or Faculty member at Indiana University;
- A former employee with retiree status;
- An employee receiving long-term disability benefits.

Dependent Child Fee Courtesy

On the first day of the session, the recipient of Dependent Child Fee Courtesy:

- 1) must be a dependent child or step-child of an eligible employee, a child or step-child of a registered domestic partner or a child whose legal guardian is an eligible employee or employee's spouse, 2) age 23 or under, 3) must be unmarried, and 4) must meet the IRS support test requirements as a dependent of the employee, spouse, or registered same-sex domestic partner.
- must be a dependent child of a deceased employee who was eligible at the time of death, and on the first day of the semester or session, meets the conditions above.

Spouse Fee Courtesy

On the first day of the session, the recipient of Spouse/Registered Domestic Partner Fee Courtesy:

- must be a legal spouse/registered domestic partner or a spouse/registered domestic partner of a deceased employee who was previously eligible.

Questions regarding IU employment eligibility should be directed to your campus Human Resources office.

Forms Required and Priority Dates

- IU Fee Courtesy Plan Enrollment Forms are to be submitted by mail to the *University Human Resources office at Poplars E165, 400 E. 7th Street, Bloomington, IN 47405* or by fax to (812) 855-3409.
- Fee Courtesy is not automatically renewable.
- To print an enrollment form and complete it manually, go to http://www.indiana.edu/~uhrs/benefits/fee_courtesy.html.
- To submit the form online go to <https://webdb.iu.edu/BenefitEnrollment/secure/home.cfm>. Once the online form has been received by our office, it will be reviewed for approval.
- In order to avoid being billed for full tuition, employees are encouraged to submit this form well before the beginning of the academic year each fall.
- If applying retroactively, enrollment forms cannot be accepted after December 31 of the year in which the academic year ended.

To ensure Fee Courtesy toward fee payment, students must return the IU Fee Courtesy Plan Enrollment Form to the Bloomington Human Resources office as soon as possible. If this enrollment form is processed after the student has been billed for tuition, the Fee Courtesy award becomes a reimbursement after the student has paid all fees. If applying for Fee Courtesy retroactively, enrollment forms cannot be accepted after December 31st of the year in which the academic year ended.

Separate applications for Fee Courtesy are required for employees applying for benefits under more than one of the

Fee Courtesy coverages (i.e. Employee Fee Courtesy, Spouse/Registered Domestic Partner Fee Courtesy, and Dependent Child Fee Courtesy).

Employees are responsible for being aware of all eligibility requirements and application procedures. Any person who knowingly makes a false statement or a misrepresentation of information pertaining to the Fee Courtesy application shall be (1) subject to cancellation of further Fee Courtesy, and (2) liable for repayment of Fee Courtesy received.

Fee Courtesy Plan Coverages

Employee & Spouse Fee Courtesy

For employees, retirees, spouses and registered domestic partners the fee courtesy value is 100% of covered tuition up to a dollar limit based on the Indiana resident per credit hour rates at each campus, and, in the case of employees, on class standing (undergraduate, graduate, or professional*). Covered tuition does include audit hours and independent study. Independent study will be administered as a reimbursement after the course has been completed.

Dependent Child Fee Courtesy

Dependent Child Fee Courtesy is a subsidy of 50% of the Indiana resident undergraduate rate, for a maximum of the first 140 credit hours (which includes any transfer hours) toward the first bachelor's degree as long as they meet the dependent child requirements as listed in the policy. Fee courtesy will apply to independent study; however it will be administered as a reimbursement after the course has been completed. Fee courtesy does not apply to audit hours.

- Covered tuition does not include special fees, such as those for laboratories, applied music, student teaching, education early experience, dissertation research fee (G901 and B798), or rental of special equipment and facilities.
- The Registrar's Office will assess non-resident fees for those employees who do not meet Indiana residency requirements.
- Questions regarding the exact value of Fee Courtesy awards should be referred to the Office of the Bursar on the campus where student will be enrolled.
- Fee Courtesy is not a cash award; rather, it is an employee benefit that pays a portion of the credit-hour fees, and in some cases, audit fees.
- Fee Courtesy awards are reduced or canceled if the student's or employee's eligibility ceases.
- Any changes in the student's enrollment may also result in changes to the amount of Fee Courtesy. Then the Office of the Bursar will bill the student for applicable fees.
- Fee Courtesy for graduate level courses is treated as taxable income under 1996 Federal legislation. In accordance with IRS regulations, these taxes will be withheld from the employee's pay. The employee's pay notice will include reference to the amount of Fee Courtesy benefits included as taxable income.

The dollar limits for each campus can be found at www.indiana.edu/~uhrs/benefits.

(* An example of professional class standing would be the Law Program.)