

OSU Staff Fee Policies and Procedures

I. ELIGIBILITY REQUIREMENTS

Faculty and staff employed half-time or more on the date classes begin may register for a maximum of 10 hours of credit, per term, at the staff rate.

*The following can **not** utilize the Staff Fee Program:*

- Academic/unclassified employees employed for less than a 90-day appointment
- Part-time employees with less than .5 FTE
- Courtesy faculty
- Federal civil service employees
- Graduate teaching/research assistants
- OSU Book Store employees
- State employees not employed by OUS
- Temporary classified employees

CREDIT HOURS - A maximum of 10 credit hours, at staff fee rates, may be taken each term with department head or director approval. Additional hours will be charged at regular student rates (see Schedule of Classes). Full-time employees may receive staff fee privileges for 2-day courses (7 credit hours maximum) and additional night hours, not to exceed a total of 10 hours. *Day courses are those meeting earlier than 5:00 pm.* Retirees and employees on authorized leave (sabbatical or LWOP) may take a full class load. Academic-year employees (to be re-appointed the following year), during summer term only, may take 12 credit hours during the eight-week session, or 18 credit hours during the eleven-week session.

The staff rate for tuition applies to all OUS institutions. Qualified employees may use the staff rate for tuition at the institution of their choice. Staff and faculty members who use the staff rates for tuition for courses away from their home institution are subject to the policies and procedures of the instructing institution.

Retired employees and staff members on approved leave are eligible for staff rates for tuition if the last FTE on record qualifies them for staff rates. Supervising teachers are eligible for staff rates for tuition (a special form must be obtained from the School of Education).

All employees, retirees, and employees on approved leave may audit courses with no tuition charge if they meet the eligibility requirements described above,

although the technology fee and any other fees associated with the class/program may still be assessed. Instructor's consent is required and registration is on a space-available basis.

NOTE: If classified, academic-year employees and 9-month academic employees are on break when summer classes begin, their FTE immediately prior to the scheduled summer break is used to determine eligibility. Employees working only during the summer are not eligible for staff rates. Employees not returning in the fall will not be eligible for staff rates during the summer session.

II. TUITION AND PROGRAM LIMITATIONS

- Employees are subject to all registration and tuition payment deadlines and fines of the instructing institution. Consult the Schedule of Classes for specific dates and amounts.
- Staff fee privileges may not be used for courses leading to a Doctor of Veterinary Medicine degree or courses in the School of Pharmacy.
- **A new Staff Fee Request must be submitted for each term.** Reduced tuition and any associated fees are NON-REFUNDABLE. There are NO exceptions to the eligibility requirements, procedures, policies and fees.
- You must be admitted as a student. Contact Admission & Orientation at (541) 737-4411. Newly admitted students should attach a **COPY** of the completed and signed Staff Fee Request form to the admission application.

III. TAXES

1. Taxes - Employees or Family Members Enrolled in Advanced Degree Programs or Graduate Level Courses. IRC Section 117 permits qualified tuition reduction and scholarship programs for employees' family members. IRC Section 117 allows undergraduate level tuition assistance as a non-taxable benefit. However, educational assistance provided to OUS employees' family members enrolled in advanced degree programs or graduate level classes for credit will be included as taxable income. The difference between the reduced tuition for total enrolled credit hours and the regular graduate tuition for total enrolled credit hours, will be taxed to the employee. IRC Section 127 allows non-taxable tuition reduction benefits for employees only, at both the undergraduate and graduate levels, beginning in 2002. The maximum annual reduction, permitted under IRC 127, is \$5250. An employee who exceeds this amount is responsible for notifying the campus Human Resources office. Taxable tuition benefits may be spread over a maximum of three months and are processed by the employee's campus for tax withholding.

2. Taxes - Domestic Partners. Staff fee privileges for a domestic partner may result in additional imputed income (the difference between the reduced tuition for total enrolled credit hours and the regular tuition for total enrolled credit hours) to the employee. The university system will withhold federal and state taxes on the imputed value of staff fee privileges for undergraduate and graduate classes taken by an employee's domestic partner. Employees whose same-sex domestic partners take undergraduate classes may be eligible for relief from state taxes, and should consult with a tax advisor for additional information. Non-resident, opposite-sex domestic partners' imputed tax value of staff fee rates is based on non-resident tuition rates under the provisions of OAR 580-010-0086.

3. Taxes - Nondiscriminatory Benefit. Under IRC 117, the staff fee plan is tested annually to determine that staff fee privileges for undergraduate courses may be offered as a non-taxable benefit to all employees. Tax status for staff fee privileges is updated at the beginning of winter term each year and provided to campus Human Resources offices. Employees should check on taxability changes when they request staff fee privileges.

IV. DIRECTIONS:

Follow the directions below for the category that best fits your situation:

OSU Employees Taking Courses at OSU

1. Complete the Staff Fee Request form. Obtain the approval and signature of your employing DEPARTMENT HEAD OR DIRECTOR. Approval is not automatic, and will be given only when the proposed class work will not interfere with regular work hours.
2. SUBMIT THE APPROVED FORM TO GENERAL ACCOUNTING, BUSINESS AFFAIRS via campus mail. Keep a copy of the form. Any revisions will be resubmitted on this copy.
3. Registration can be completed before or after submission of the Staff Fee Request form. Your bill will not be adjusted until Business Affairs has received the approved form.

Retirees Taking Courses at OSU

1. Submit a copy of your OSU/OUS retiree identification with your Staff Fee Request form (does not need department head or director signature) to OSU, OFFICE OF HUMAN RESOURCES, 122 Kerr Administration, Corvallis, OR, 97331-2132.

2. Keep a copy of the form. Any revisions must be resubmitted on this copy.

Supervising Teachers

1. New: Submit a special form/waiver from the OUS institution for which you served as a supervising teacher to the OSU School of Education, 210B Education Building, Oregon State University, Corvallis, OR 97331. A staff fee request will be processed by the School of Education and submitted directly to the Business Affairs office.
2. Keep a copy of this form.

Employees on Authorized Leave

1. SUBMIT AN APPROVED STAFF FEE REQUEST FORM AND ATTACH A COPY OF AUTHORIZATION FOR LEAVE TO OSU, DEPARTMENT OF HUMAN RESOURCES, 122 Kerr Administration, Corvallis, OR, 97331-2132.
2. Keep a copy of the form. Any revisions must be resubmitted on this copy.

OUS Rule Prohibiting Concurrent Faculty/Student Status (applies to academic employees enrolled in a graduate level program only)

OAR 580-20-005 (1) Academic ranks shall consist of graduate and faculty rank.

Graduate ranks are:

- Graduate Teaching Assistant
- Graduate Research Assistant
- Fellow

Faculty ranks are:

- Instructor
- Senior Instructor
- Research Assistant
- Research Associate
- Lecturer
- Assistant Professor
- Associate Professor
- Professor

Faculty rank will not be given to graduate students.

DUE DATE: Staff Fee Request forms are to be submitted no later than the close of business at the end of the fourth week of the term. Staff fees generally will not be approved if the request form is not received by the Benefits Office, Office of Human Resources, by this date. If you have extenuating circumstances that prohibit you from meeting the deadline, you must attach a Request for Late Approval form to the Staff Fee Request form.

V. FEES

Staff Rates For Tuition:

\$15.00 per credit hour/quarter (maximum of 10 credit hours).
No charge for audit enrollments.

Auditing Courses: Staff fees are not assessed to employees or family members who audit courses. However, attendance at these courses will be with the consent of the instructor and on a space-available basis. The university is not required to maintain a record of the courses audited.

Technology Fee: All faculty and staff are required to pay this fee. The charge is pro-rated based upon the number of credit hours being taken.

Study Resource Fee: Faculty and staff enrolled in an Engineering, Pharmacy or College of Business MBA program will be required to pay the appropriate fee.

Course Fees: You will be assessed any fees associated with specific courses (see Schedule of Classes).

Refunds: Reduced Tuition and any associated fees are **not** refunded.

Fees Not Assessed: Employees eligible for staff fee privileges are **not** charged the building, health service and incidental fees and, are therefore not eligible for associated privileges with these fees (i.e.: Student Health Center, athletic facilities, etc.).

VI. QUESTIONS???

If, after reading this information, you have other questions, contact the Benefits Coordinator at (541) 737-2916 or **Benefits.Coordinator@orst.edu**. Questions about billing or charges should be directed to General Accounting at (541) 737-3775.

VII. FORM

Click here to access the downloadable form in .pdf format to print and complete. Completed forms should be returned to General Accounting.