



# IU Tuition Benefit Plan Application

## 2025 – 26 Academic Year

**IMPORTANT—PLEASE READ ALL INFORMATION ON REVERSE SIDE BEFORE COMPLETING THIS FORM**

To avoid being billed for full tuition, you are encouraged to submit this application well before the beginning of the academic year each fall. All applications must be submitted by the semester/term deadline to receive the IU Tuition Benefit. If this application is processed before the deadline, but after the student is billed for tuition, the IU Tuition Benefit becomes a reimbursement after the student has paid all tuition.

**SECTION 1—EMPLOYEE INFORMATION**

Employee Name:		10-Digit University ID:	
Address:	City:	State:	Zip:
Campus:		Phone:	
Email:			

**SECTION 2—STUDENT INFORMATION**

Student Name:		10-Digit University ID:	
Address:	City:	State:	Zip:
Recipient: <input type="checkbox"/> Employee <input type="checkbox"/> Resident <input type="checkbox"/> Retiree <input type="checkbox"/> Spouse* (Marriage Date: _____) <input type="checkbox"/> Dependent Child*			
Campus of Enrollment (select only one location. If registered for classes on multiple campuses, complete a separate application for each campus): <input type="checkbox"/> Bloomington <input type="checkbox"/> Indianapolis <input type="checkbox"/> Columbus <input type="checkbox"/> Fort Wayne <input type="checkbox"/> East <input type="checkbox"/> Kokomo <input type="checkbox"/> Northwest <input type="checkbox"/> South Bend <input type="checkbox"/> Southeast			
Degree Program: <input type="checkbox"/> Advance College Project (ACP) <input type="checkbox"/> Undergraduate <input type="checkbox"/> Graduate—Semesters <input type="checkbox"/> Graduate—Quarters <input type="checkbox"/> Graduate—Kelley MBA—Quarters <input type="checkbox"/> Graduate—Kelley MBA—Semesters <input type="checkbox"/> O'Neill Online <input type="checkbox"/> Cybersecurity Risk Management <input type="checkbox"/> Graduate—Professional			
I am applying for the IU Tuition Benefit for (check all that apply): <input type="checkbox"/> Fall 2025 Semester/Quarter <input type="checkbox"/> Winter 2025 Quarter <input type="checkbox"/> Spring 2026 Semester/Quarter <input type="checkbox"/> Summer 2026 Semester/Quarter			

**FOR DEPENDENT CHILD TUITION BENEFIT ONLY:**

Dependent date of birth:	Dependent Age:
Will the dependent child: 1. Complete a bachelor's degree before the above period(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No 2. Be married? <input type="checkbox"/> Yes <input type="checkbox"/> No 3. Meet the IRS Support Test requirements as a qualifying child of the employee/employee's spouse (e.g. claimed as a Federal Income Tax dependent)? <input type="checkbox"/> Yes <input type="checkbox"/> No	

\* Documentation to verify the relationship (e.g. marriage or birth certificate, guardianship order) is required to be submitted with this application unless such documentation has been previously submitted.

**SECTION 3—AFFIRMATION/SIGNATURE**

<b>STUDENT AFFIRMATION</b> By signing and dating this form, 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 Tuition 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 Tuition Benefit program. I understand that the Tuition Benefit that I am receiving is through an eligible Indiana University employee and, for the purposes of implementation of this benefit, I authorize Indiana University to issue periodic notices of the number of credit hours I have earned to the Indiana University employee through whom I am receiving this benefit.	<b>EMPLOYEE AFFIRMATION</b> By signing and dating this form, 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. I 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 Tuition Benefit 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 Tuition Benefit and which I have not paid within the time-frame specified by the Office of the Bursar. I further consent, in accordance with IRS regulations, to have applicable taxes withheld from my paycheck, if applicable.
Student Signature	Employee Signature
Date	Date

To sign and submit this form digitally you must first save it to your device.

Submit this form and required documentation to [hrbnfts@iu.edu](mailto:hrbnfts@iu.edu) or mail to IU Human Resources, 2709 E 10th Street, Suite 321, Bloomington, IN 47408.

**PLEASE NOTE:** It is your responsibility to understand and comply with the eligibility criteria and application procedures. Providing false or misleading information in connection with this application may result in termination of your benefits and/or a requirement to repay any benefits that you have received under the plan.



## Who is eligible for this benefit

**Employee and retiree eligibility** - The following categories of individuals associated with Indiana University are eligible for the IU Tuition Benefit. You must have such status by the end of the first week of classes or at the time of registration for IUHS courses.

- Full-time (75% FTE or greater) appointed academic and staff employees (including IU residents);
- Full-time (75% FTE or greater) appointed academic and staff employees (including IU residents) on an approved leave of absence, other than a leave without pay prior to active employment.
- Former employees with IU retiree status.
- Disabled former full-time (75% FTE or greater) appointed academic and staff employees (including IU residents) receiving long-term disability benefits from a university-sponsored plan, Social Security Administration, or PERF.

**Spouse eligibility** - A spouse means one by marriage, either opposite-sex or same-sex, legally entered into in one of the 50 states, the District of Columbia, or a U.S. territory or a foreign country. The spouse must meet the definition of a spouse of an eligible employee or retiree, or of a deceased employee or retiree who was eligible at the time of their death, by the first day of the semester or term.

**Dependent child eligibility** - A dependent child is the biological or adopted child, stepchild, or child whose legal guardian is an eligible individual. The child must also:

- be unmarried; and
- be 23 years of age or under, and
- meet the [IRS support test](#) requirements as a qualifying child of the employee or spouse.

The dependent child must meet the definition of a dependent child of an eligible employee or retiree, or of a deceased employee or retiree who was eligible at the time of their death, by the first day of the semester or term. Additionally, individuals are not eligible to receive benefits as both an employee and a dependent or as a dependent of more than one employee.

**Ineligibility** - IU Tuition Benefit awards are reduced or canceled if the student or employee's eligibility ceases. Eligibility for the IU Tuition Benefit will cease at the conclusion of the semester/term in which:

- The employee is no longer an eligible individual, in accordance with plan provisions, for reasons other than disability, death or termination with IU Retiree Status; or
- The spouse or the dependent child cease to meet the definitions of a spouse or dependent child, respectively, as specified in the plan; or
- The dependent child receives a bachelor's degree, or the child accumulates 140 credit hours of IU Tuition Benefit awards, whichever comes first.

## What's covered by the benefit

**Employees and retirees** - Tuition costs up to a set dollar maximum based on the campus of enrollment and degree program.

**Spouses** - Tuition costs up to a set dollar maximum based on the campus of enrollment.

**Dependent children** - 50% of tuition costs at the Indiana resident undergraduate rate until they (a) complete a bachelor's degree, **or** (b) reach 140 credit hours of IU Tuition Benefit awards as a dependent, whichever comes first. The benefit does not apply to audit hours or graduate coursework but can be applied toward multiple campuses of enrollment each semester.

**Advance college project (ACP) courses** - 50% of tuition costs for ACP courses. Learn more at [acp.iu.edu](#).

**Benefit maximums** - Benefit maximums for the current semester/term are available at [hr.iu.edu/benefits/tuition-ratetable.htm](#). All summer sessions combined are considered one semester.

**IU High School (IUHS)** - 25% waiver of course tuition for IUHS courses.

**Note:** To apply for this benefit, a separate [IUHS Tuition Waiver Application](#) must be submitted before the student registers for classes. Learn more at [iuhighschool.iu.edu](#).

## What's not covered by the benefit

The following costs **are not** covered by the benefit:

- Tuition costs above the benefit maximums for the semester/term.

- Special fees (e.g., those for music performance studies, student teaching, laboratories, early education experience, advanced dissertation research (B798, G831, G901, or equivalent), testing out of courses, rental of special equipment or facilities, and fees for non-credit courses).
- Mandatory student fees (e.g., student technology, activity, athletic fees).

## Plan rules to keep in mind

**Registration for courses during work hours** - Employees who wish to enroll in university classes scheduled during normal work hours must obtain advance approval from their department head. Check the applicable *Training and Education* policy for details on taking time off for classes.

**Course registration/enrollment changes** - If the student's enrollment or registration changes, their tuition benefit award will be adjusted accordingly.

**Benefit taxation** - The plan follows the IRS rules defined under Sections 117 and 127 of the tax code. Here's how the taxes work depending on who is using the benefit and what kind of classes are being taken:

**Undergraduate-level tuition** - If the benefit is for undergraduate-level tuition, it is not taxed for anyone—employee, retiree, spouse, or child.

**Graduate-level tuition** - If the benefit is for graduate-level tuition, it is potentially taxable.

- Employees and retirees can receive up to \$5,250 in graduate-level tuition benefit awards each year tax-free.
- Amounts above \$5,250, or any graduate-level tuition benefit awards for spouses, are considered taxable income for the employee or retiree.

Any taxes are deducted from the employee's pay, generally over several paychecks. For retirees, the value of the graduate-level benefits will be reported as taxable gross income on a W-2 form. For additional information, visit the [Fringe Benefits page](#) or contact the Office of the University Controller through their [online support form](#).

## How do I apply for the benefit?

You can apply for the benefit using one of the following methods:

- Apply online at [tba.apps.iu.edu](#); or
  - Download the paper form from [hr.iu.edu/benefits/tuition.html](#) and submit it to IU Human Resources at the address or email listed on the bottom of the form.
- *Note: Retirees must use the paper form to apply.*

Applications may be submitted up to a full academic year in advance, but no later than the deadlines listed below. After these deadlines, no tuition benefit will be awarded for that semester/term.

### Application deadlines:

Semester/term	Deadline
Fall	October 30
Winter	January 30
Spring	March 30
Summer	July 30

A separate application must be completed for each student and for each campus of enrollment. For employees, retirees, and spouses, only one tuition benefit award will be applied each semester/term, but it can be split over multiple campuses.

Documentation showing that an individual is a qualified dependent (marriage or birth certificate, guardianship orders, as applicable) is required at the time of initial enrollment and periodically thereafter. Failure to provide this documentation within 30 days of written request from the university may result in the termination of any IU Tuition Benefit awards.

If your application is processed after the student has been billed for tuition, the student is responsible for paying the full tuition bill by its due date. Once the application form is processed, the student will receive a refund through the bursar's office.

## Customer service

For questions about the IU Tuition Benefit, contact IU Human Resources at [askhr@iu.edu](mailto:askhr@iu.edu) or (812) 856-1234.