Online Tuition Concession

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Human Resources
Wake Forest University
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Accessing the Online Form

Step 1

Log into WIN by opening your web browser and typing win.wfu.edu into the address bar. Enter your Wake Forest user name and password, and click log in.

Step 2

Click the WF@Work link.

Step 3

Under the Benefits and Deductions header, click the Tuition Concession link.
Completing the Form for a Dependent Child

Step 1
To submit a tuition concession request, click Request New Concession.

Step 2
If you see your dependent listed, click his or her name. You may proceed to Step 3.
If you do not see your dependent listed, click the Create Student button. Enter the first name, middle name, last name, relationship to you, date of birth, and student ID number. Click Save.

Step 3
Answer the following question by clicking Yes or No.
Step 4 (A)

If you answered Yes in Step 3, read the following statement and click I have read the above statement.

I understand that the tuition concession benefit will be taxable to me, if any of the below conditions apply:
- if my child does not qualify as a tax dependent. Use this IRS process to determine whether your child will qualify as a tax dependent.
- if the tuition benefit is for a same-sex domestic partner or a same sex domestic partner's child.
- if the tuition benefit is for graduate level coursework at Wake Forest University for a spouse or same-sex domestic partner.
- if you are employed by Reynolda House.

I have read the above statement  Back

Step 4 (B)

If you answered No, provide your response in the field and click Submit.

Describe your financial responsibility and support for your child in the last two years, and indicate why you consider him/her a “dependent” for the purpose of the tuition concession benefit. If your child does not qualify as an IRS tax dependent, then any amount remitted for your tuition concession benefit will be reported as taxable income to you.

Submit  Back

Step 5

Click the select Wake Forest University, choose from your previous institutions, or search the database.

If you clicked Search Institutions, you may enter the name, city, and/or state. Click Search.

Please select the institution

Wake Forest University  Previous Institutions  Search Institutions  Back

Please select the institution

University Name:  City  State

Search
If you cannot find the institution, you may create a new one by entering the name and clicking **Create New Institution**.

### Step 6

After you have selected the institution (Wake Forest University or another institution), you will need to:

- Specify the Student ID number. *(If the primary ID number displayed is correct, click the number. If it is incorrect, enter the correct number in the Student ID box.)*
- Select the appropriate term or semester. If applicable, click the box beside Study Abroad box.
- Enter the year.
- Select the enrollment status.
- Click **Continue**.

![Institution Selection Form]

### Step 7

Select the method of payment.

![Payment Method Selection]

6
Step 8 (A)

If you selected the **Send payment to the institution** option, upload an itemized bill by:

- Scanning the document
- Clicking the **Choose file** button
- Locating the scanned document on your computer
- Clicking the **Open** button

Enter the institution address (listed on the itemized bill).

Click **Continue**.

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Step 8 (B)

If you selected the **Send payment to me via direct deposit** option, an itemized bill, along with documentation that the bill was paid by:

- Scanning both files as one attachment
- Clicking the **Choose File** button
- Locating the scanned document on your computer
- Clicking **Open**

Click **Continue**.

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Step 9

Verify that the information on the screen is accurate.

If correct, click **Certify and Submit**.

If incorrect, click **Back**, and correct the information.
Step 10

Ensure that you see a confirmation that your record has been successfully created.
Completing the Form for a Spouse or Domestic Partner

Step 1

To submit a tuition concession request, click **Request New Concession**.

![Request New Concession button](image)

Step 2

If you see your spouse or domestic partner listed, click his or her name. Proceed to Step 3.

If you do not see your spouse or partner listed, click **Create Student**. Enter the first name, middle name, last name, relationship to you, date of birth, and student ID number. Click **Save**.

![Create Student form](image)

Step 3

Complete the following information:

- Specify the Student ID number. *(If the primary ID displayed is correct, click the number. If it is incorrect, enter the correct number in the Student ID box.)*
- Select the appropriate term or semester. If applicable, click the box beside Study Abroad.
- Enter the year.
- Select the enrollment status.
- Indicate the additional enrollment information that applies for that semester.
- Click **Continue**.
Step 4

Verify that the information on the screen is accurate.

You are about to create a new tuition concession request. Please review the information below. If it is correct, please click the "Certify and Submit" button. If you need to make corrections to the information, please click the "Back" button.

<table>
<thead>
<tr>
<th>Name</th>
<th>John Doe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>Fall</td>
</tr>
<tr>
<td>Year</td>
<td>2014</td>
</tr>
<tr>
<td>Study Abroad</td>
<td>No</td>
</tr>
<tr>
<td>Enrollment</td>
<td>Graduate, Part-time</td>
</tr>
<tr>
<td>Institution</td>
<td>Wake Forest University</td>
</tr>
</tbody>
</table>

If correct, click **Certify and Submit**.
If incorrect, click **Back**, and correct the information.

Step 5

Ensure that you see a confirmation that your record has been successfully created.
Tracking an Online Request

Step 1
Log into WIN and access the online Tuition Concession tool by following steps 1 – 3 on page 3 of this guide.

Step 2
Click My Concessions.

Step 3
Click the student’s name.

Step 4
The status is displayed in the Status column. Hover over the text for a short description.
Contact Information and Resources

AskHR (AskHR@wfu.edu or 336.758.4700): Questions about eligibility or a request you have submitted.

Human Resources website: Detailed tuition concession information and policies.