



WAKE FOREST
UNIVERSITY

Human Resources

Online Tuition Concession

June 1, 2014
Human Resources
Wake Forest University

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Accessing the Online Form

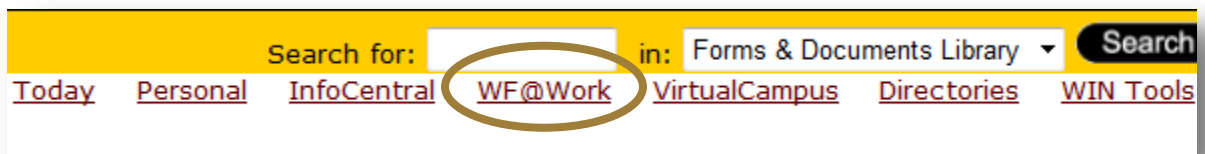
Step 1

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**.



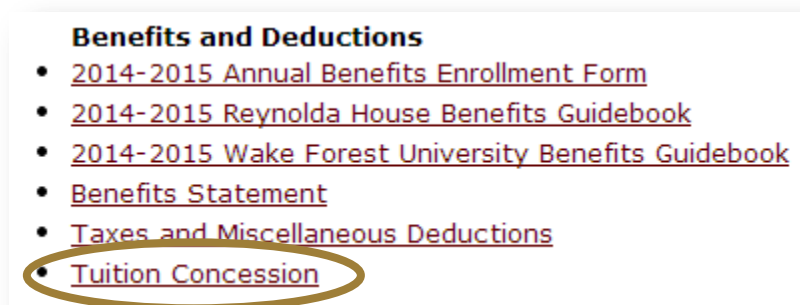
Step 2

Click the **WF@Work** link.



Step 3

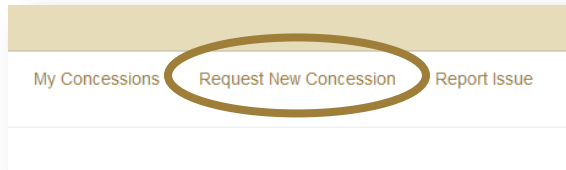
Under the **Benefits and Deductions** header, click the **Tuition Concession** link.



Completing the Form for a Dependent Child

Step 1

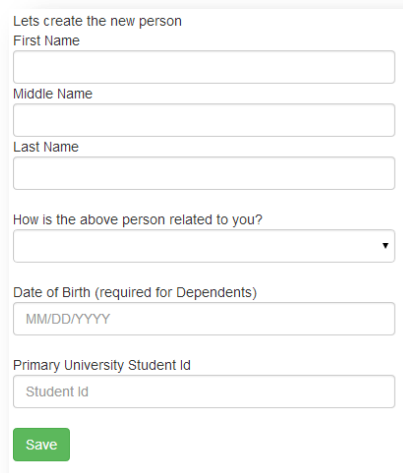
To submit a tuition concession request, click **Request New Concession**.



Step 2

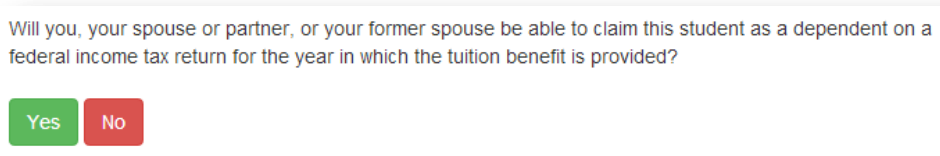
If you see your dependent listed, click his or her name. You may proceed to Step 3.

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**.

A form titled 'Lets create the new person' with the following fields: 'First Name', 'Middle Name', 'Last Name', 'How is the above person related to you?' (a dropdown menu), 'Date of Birth (required for Dependents)' (with a placeholder 'MM/DD/YYYY'), and 'Primary University Student Id' (with a placeholder 'Student Id'). A green 'Save' button is at the bottom.

Step 3

Answer the following question by clicking **Yes** or **No**.

A question box with the text: 'Will you, your spouse or partner, or your former spouse be able to claim this student as a dependent on a federal income tax return for the year in which the tuition benefit is provided?'. Below the text are two buttons: a green 'Yes' button and a red 'No' button.

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.

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.

Step 5

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

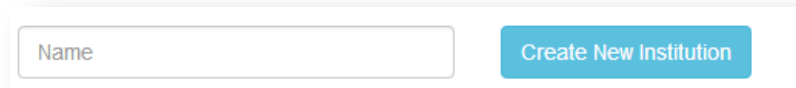
Please select the institution

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

Please select the institution

University Name City State

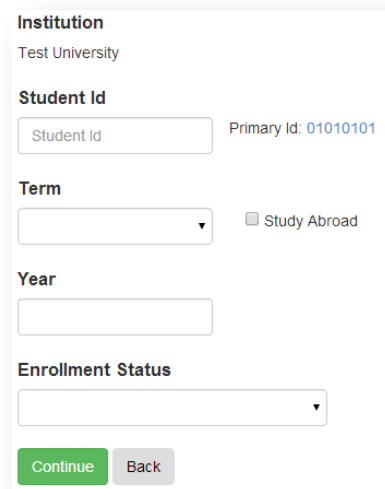
If you cannot find the institution, you may create a new one by entering the name and clicking **Create New Institution**.



Step 6

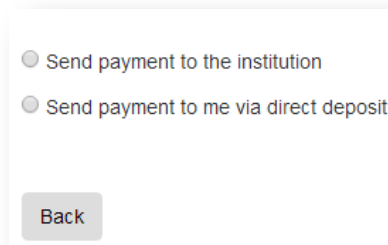
After you have selected the institution (Wake Forest University or another institution), you will need to:

- 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**.



Step 7

Select the method of payment.



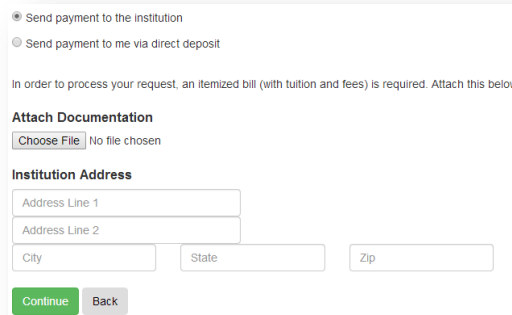
Step 8 (A)

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**.



The screenshot shows a web form with two radio button options at the top: 'Send payment to the institution' (selected) and 'Send payment to me via direct deposit'. Below the options is a note: 'In order to process your request, an itemized bill (with tuition and fees) is required. Attach this below.' Underneath is a section titled 'Attach Documentation' with a 'Choose File' button and the text 'No file chosen'. Below that is the 'Institution Address' section, which includes input fields for 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip'. At the bottom of the form are two buttons: 'Continue' (highlighted in green) and 'Back'.

Step 8 (B)

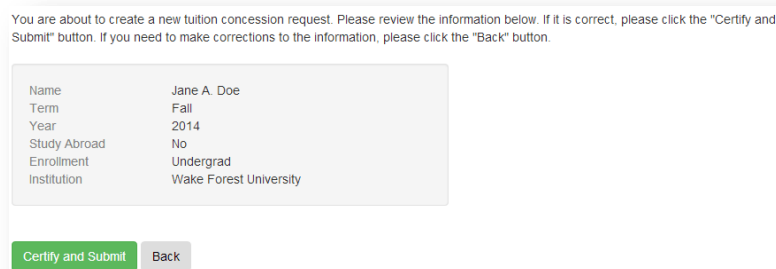
If you selected the **Send payment to me via direct deposit** option, an itemized bill, along with documentation that the bill was paid by:

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

Click **Continue**.

Step 9

Verify that the information on the screen is accurate.



The screenshot shows a summary screen for a tuition concession request. At the top, it says: '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.' Below this is a table with the following information:

Name	Jane A. Doe
Term	Fall
Year	2014
Study Abroad	No
Enrollment	Undergrad
Institution	Wake Forest University

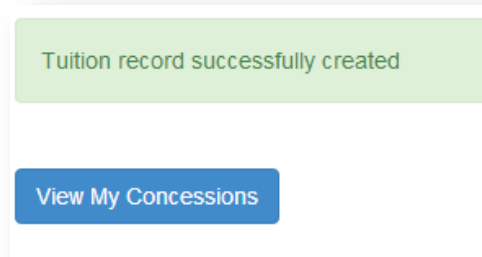
At the bottom of the form are two buttons: 'Certify and Submit' (highlighted in green) and 'Back'.

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

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

Step 10

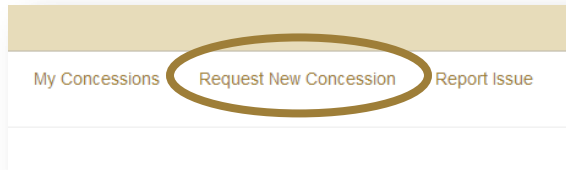
Ensure that you see a confirmation that your record has been successfully created.



Completing the Form for a Spouse or Domestic Partner

Step 1

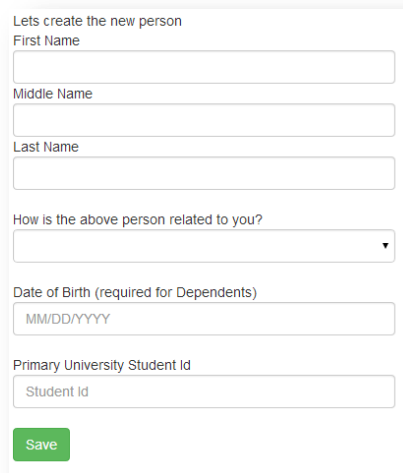
To submit a tuition concession request, click **Request New Concession**.



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**.

A form titled 'Lets create the new person' with the following fields: 'First Name', 'Middle Name', 'Last Name', 'How is the above person related to you?' (a dropdown menu), 'Date of Birth (required for Dependents)' (with a placeholder 'MM/DD/YYYY'), and 'Primary University Student Id' (with a placeholder 'Student Id'). A green 'Save' button is at the bottom.

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**.

Institution
Wake Forest University

Student Id
 Primary Id: 14141414

Term
 Study Abroad

Year

Enrollment Status

Additional enrollment information: Full-time Part-time Auditing

Note: Tuition Concession for education at the undergraduate level is tax free for a spouse; however, graduate level is taxable income to the employee. The tuition concession amount for a same-sex domestic partner regardless of whether the education is undergraduate or graduate level. If a spouse or same-sex domestic partner is or becomes employed at Wake Forest University in a benefit eligible position, they are not eligible for a tuition concession.

[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.

Name	John Doe
Term	Fall
Year	2014
Study Abroad	No
Enrollment	Graduate : Part-time
Institution	Wake Forest University

[Certify and Submit](#) [Back](#)

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.

Tuition record successfully created

[View My Concessions](#)

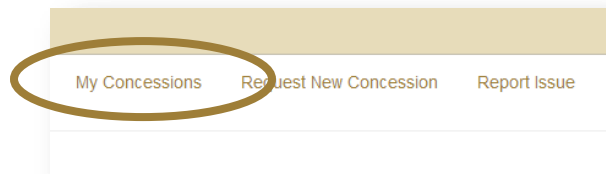
Tracking an Online Request

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.

Tuition Records

Academic Year	Term	Institution	Count	Amount	Requested	Status
2014/2015	Fall	Wake Forest University			05/22/2014	HR

[New Concession for John](#) [Edit Student Information](#)

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](#).