Online Tuition
Concession
Faculty and Staff

July 2015
Human Resources
Wake Forest University
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Accessing the Tuition Concession Form

Wake Forest University offers a tuition concession benefit to Faculty or Staff that have been employed for two full-time continuous years of service. The benefit includes part-time undergraduate or graduate coursework at Wake Forest University. It also covers part-time undergraduate coursework at other institutions, but it must be directly related to your position or responsibilities, and it must be your first undergraduate degree.

Step 1

Log into WIN by opening your web browser (Chrome is the recommended 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.
Submitting a Request

Step 1: Request New Concession

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

Step 2

If you see your name listed, click on your name. You may proceed to Step 3.

If you do not see your name 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: Taxable Notification

The next step is to review the Taxable Notification section. This section reviews when your education is taxable, how it is taxed, and how it is processed.

Your education is taxable if you are:

- Enrolled in a graduate course that would qualify you for a new trade, business, or career, whether or not the course is determined to be job-related.
- Enrolled as a graduate student, taking an undergraduate class for fulfillment of a graduate degree program.

When the course(s) are taxable:

- The amount will be treated as income subject to payroll tax withholdings.
- The taxes must be paid during the semester in which the Tuition Concession request is made.

Review the Taxable Notification and click I have read the above statement.

Step 4: Institution Selection

Complete the Institution Selection by clicking on one of the three options:
Option One:

- **Wake Forest University.**

Option Two:

- **Previous Institutions.**
  If this is your first Tuition Concession request, there will not be any institutions listed for this field.

![University Name Table](image1)

<table>
<thead>
<tr>
<th>University Name</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wake Forest University</td>
<td>Winston Salem</td>
<td>NC</td>
</tr>
</tbody>
</table>

Option Three:

- **Search Institutions.**
  If you clicked **Search Institutions**, you may enter the **University Name**, **City**, and/or **State**. Click **Search**.

![Search Institutions](image2)

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

![Create New Institution](image3)
Step 5: Enrollment Information

After you have selected the institution, you will need to complete your Enrollment Information:

1. Specify the **Student ID**.
2. Select the appropriate **Term**.
3. Enter the **Year**.
4. Select the **Enrollment Status**.
5. Click **Continue**.
Step 6: Degree Information

After you have completed the enrollment information, you will need to complete your Degree Information:

1. Select your **Highest Degree**.
2. Select whether you are **Degree Seeking**. If you answered yes, specify the type of **Degree** and the **Field of Study**.

3. Specify your Current GPA. If this is your first semester, please enter ‘0’.
4. Click **Continue**.

Step 7: Course Information

Specify the course(s) that you are enrolled in by entering Course Information.

1. Enter the **Title, Course Number**.
2. Specify the **Course Level**.
If the Course Level selected was **Graduate**, complete the following:

- **Provide the Course Description.** You may copy and paste this information from the course catalog.
- **Provide your response to how this class is directly related to the essential functions of your current position/job at WFU.**

3. Specify the number of **Credits**.
4. If you are auditing the course, click the box beside **Auditing**.
5. Click **Add Course**.
6. If you are adding another course, repeat Step 7 again.

If you entered incorrect information for a course, you may make corrections by clicking on the course, updating the information, and clicking **Add Course**.

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**Step 8: Manager Information**

After you have completed adding the course(s) that you are enrolled in, you will need to:

1. Specify the Approving Manager. Enter the **Manager’s Banner ID** or click **Search for Manager**.
If you click **Search for Manager:**

- Enter the Manager’s **First** and/or **Last Name**.
- Click **search**.

Once the Approving Manager’s name is located:

- Click the **Name**.

<table>
<thead>
<tr>
<th>Banner ID</th>
<th>Name (Preferred)</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000000</td>
<td>Doe, Janice (Jane)</td>
<td><a href="mailto:test@wfu.edu">test@wfu.edu</a></td>
</tr>
</tbody>
</table>

2. Click **Done Adding Courses**.

3. If you selected Wake Forest University as the institution, proceed to Step 11.

**Step 9: Payment Information**

Select the **Method of Payment**.

- If you selected **Send payment to the institution**, proceed to Step 10 (A).
- If you selected **Send payment to me via direct deposit**, proceed to Step 10 (B)
Step 10 (A): Payment to the Institution

1. Upload an **Itemized Bill** by:
   - Scanning/saving the Itemized Bill to your computer as a PDF. Limit the title to less than 15 characters. You may view an example of an itemized bill by clicking the itemized bill example box on this page.
   - Clicking **Choose File**.
   - Selecting the scanned/saved document.
   - Clicking **Open**.
2. Specify the **Institution Address**.
3. Click **Continue**.
Step 10 (B): Payment via Direct Deposit

1. Upload an **Itemized Bill** and **Receipt**, that indicates that the bill was paid by:
   - Scanning/saving the Itemized Bill and Receipt to your computer as a PDF. Limit the title to less than 15 characters. You may view an example of an itemized bill and proof of payment by clicking the corresponding boxes on this page.
   - Clicking **Choose File**.
   - Selecting the scanned/saved document.
   - Clicking **Open**.

2. Click **Continue**.
Step 11: Certification Information

The last step is to review the information on the Certification screen.

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

Step 12: Confirmation

Once you have completed your request, you will receive an immediate confirmation that your tuition record was successfully created. Once you have completed this process, your request will be sent to your manager or department approver for review and approval.
Tracking a Request

Once you have successfully submitted your tuition concession request, you may track it online by logging into WIN and accessing the online Tuition Concession tool.

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 your name.

Step 4

The status is displayed in the Status column. Descriptions are given below based on the given status code:

- **HR**: Pending approval by HR.
- **Manager**: Pending Dept Head/Manager review.
- **Fin Aid**: Pending processing by Financial Aid.
- **Acct Pay**: Pending processing by Accounts Payable.
- **Payroll**: Pending processing by Payroll.
- **Completed**: Processing is Complete.
- **Rejected**: Request was Rejected.
- **Returned**: Returned for Correction.
Contact Information and Resources

If you have any questions about your eligibility or a request you have submitted, you may contact Human Resources:

Tuition@wfu.edu or 336.758.4700

You may review detailed Tuition Concession Information and the Policy, by going to the Human Resources website.