



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.

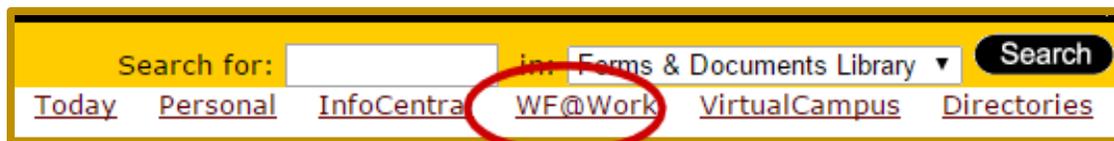
Step 1

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**.



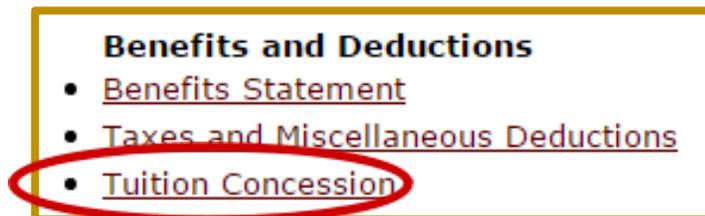
Step 2

Click the **WF@Work** link.



Step 3

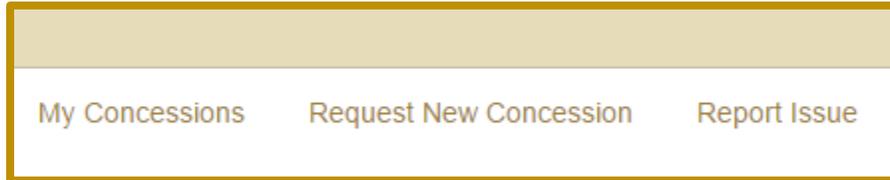
Under the **Benefits and Deductions** header, click the **Tuition Concession** link.



Submitting a Request

Step 1: Request New Concession

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



A horizontal navigation menu with a light beige background and a dark beige border. It contains three text links: "My Concessions", "Request New Concession", and "Report Issue".

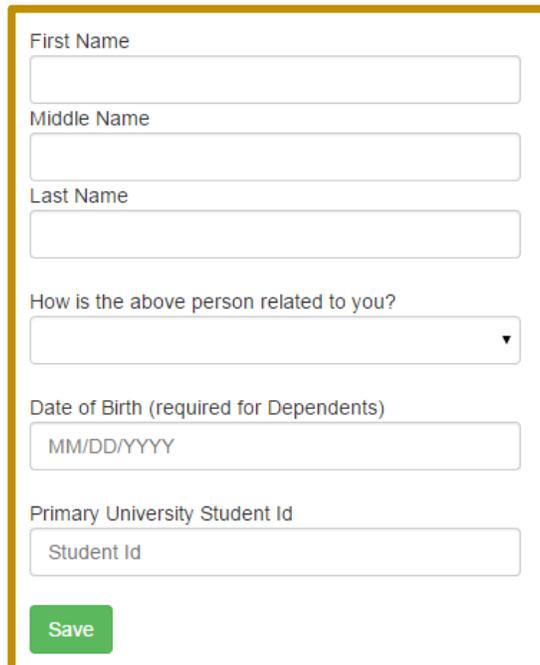
Step 2

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



A user selection interface with a light gray background and a dark gray border. It features a radio button next to the name "Jonathan J. Doe". Below the name is a blue button with the text "Create Student".

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**.



A form for creating a student with a white background and a dark gray border. It contains the following fields and controls:

- First Name: Text input field
- Middle Name: Text input field
- Last Name: Text input field
- How is the above person related to you?: Dropdown menu
- Date of Birth (required for Dependents): Text input field with placeholder "MM/DD/YYYY"
- Primary University Student Id: Text input field with placeholder "Student Id"
- Save: Green button

Step 3: Taxable Notification

The next step is to review the Taxable Notification section. This section reviews when you 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**.

Taxable Notification

You may be eligible for a tax-free tuition waiver on your education assistance in the amount of \$5,250 in a calendar year. Unless you elect otherwise, half of this waiver (\$2,625) would be applied during the Spring, and the other half (\$2,625) would be applied during the Fall. If the tuition concession request is for the Spring, the taxable amount would be spread over four months (February through May). If the request is for the Fall, the taxable amount would be spread over four months (September through December). If the request is for the Summer, the taxable amount may be spread over one or two months.

Per Treasury Regulation Section 1.162-5(b)(3) and 1.162-5(a)(1)(2), you will be responsible for paying taxes on tuition costs that exceed \$5,250 (per calendar year) if:

- A graduate course qualifies you for a new trade, business, or career, whether or not the course is determined to be job-related.
- You are enrolled as a graduate student, taking an undergraduate class for fulfillment of a graduate degree program

If it is determined that your tuition is taxable:

- The amount will be treated as income subject to payroll tax withholdings (Federal, State, and FICA).
- Taxes must be paid during the semester in which the tuition concession request is made.

[I have read the above statement](#)

Step 4: Institution Selection

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

Please select the institution

[Wake Forest University](#) [Previous Institutions](#) [Search Institutions](#) [Back](#)

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	City	State
Wake Forest University	Winston Salem	NC

Option Three:

- **Search Institutions.**

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

University Name <input type="text" value="University Name"/>	City <input type="text" value="City"/>	State <input type="text" value="St"/>
<input type="button" value="Search"/>		

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

<input type="text" value="Name"/>	<input type="button" value="Create New Institution"/>
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Step 5: Enrollment Information

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

Enrollment Information

Institution
Wake Forest University

Student Id
 Primary Id:

Term

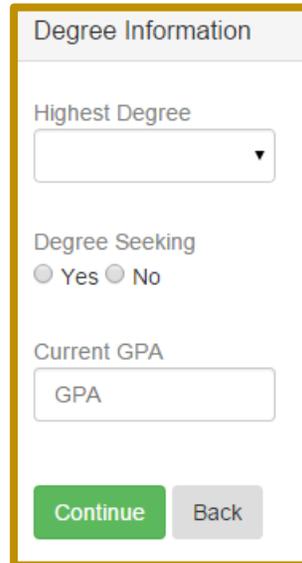
Year

Enrollment Status

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:



The screenshot shows a form titled "Degree Information". It contains the following fields and controls:

- Highest Degree:** A dropdown menu.
- Degree Seeking:** Radio buttons for "Yes" and "No".
- Current GPA:** A text input field with the placeholder text "GPA".
- Buttons:** A green "Continue" button and a grey "Back" button.

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**.



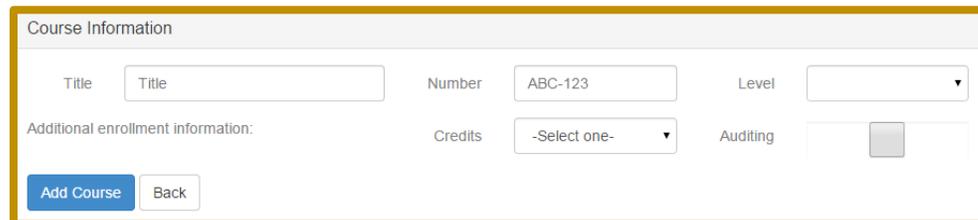
This screenshot shows a section of the form with the following elements:

- Degree Seeking:** Radio buttons for "Yes" (selected) and "No".
- Degree:** A dropdown menu.
- Field of Study:** A text input field.

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.



The screenshot shows a form titled "Course Information" with the following fields and controls:

- Title:** A text input field with the placeholder text "Title".
- Number:** A text input field with the value "ABC-123".
- Level:** A dropdown menu.
- Additional enrollment information:** A section containing:
 - Credits:** A dropdown menu with the value "-Select one-".
 - Auditing:** A checkbox.
- Buttons:** A blue "Add Course" button and a grey "Back" button.

1. Enter the **Title, Course Number**.
2. Specify the **Course Level**.

If the Course Level selected was **Graduate**, complete the following:

Description

Describe how this class is directly related to the essential functions of your current position/job at WFU

- 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**.

Courses Added to the current request:

1.  ABC-123 Gardening

Step 8: Manager Information

Courses Added to the current request:

1.  ABC-123 Gardening

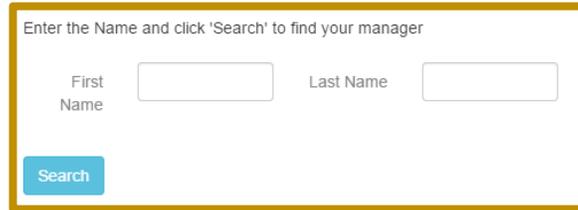
Manager Review is required for courses. Please enter your manager's ID or search.

Manager Id

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 Name and click 'Search' to find your manager

First Name Last Name

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

Once the Approving Manager's name is located:

- Click the **Name**.

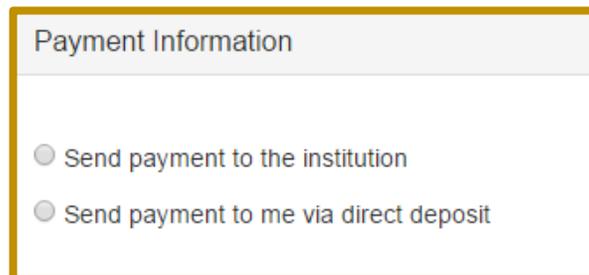
Banner ID	Name (Preferred)	E-Mail
00000000	Doe, Janice (Jane)	test@wfu.edu

2. Click **Done Adding Courses**.



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

Step 9: Payment Information



Payment Information

Send payment to the institution

Send payment to me via direct deposit

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

Payment Information

Send payment to the institution
 Send payment to me via direct deposit

In order to process your request, an itemized bill (with tuition and fees) is required. Attach this documentation below.

Attach Documentation [Itemized Bill Example](#)

No file chosen

The preferred document type is PDF, and the title should not exceed 15 characters.

Institution Address

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

Payment Information

Send payment to the institution

Send payment to me via direct deposit

In order to process your request, an itemized bill (with tuition and fees) and a receipt is required (i.e. tuition statement with the receipt on the bill, credit card statement or cancelled check). Attach this documentation below.

Attach Documentation [Itemized Bill Example](#) [Receipt Example](#)

No file chosen

The preferred document type is PDF, and the title should not exceed 15 characters.

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

Certification

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	Jonathan J. Doe
Term	Fall
Year	2015
Study Abroad	No
Enrollment	Undergrad
Institution	Wake Forest University

As you prepare to submit your new tuition concession request, please review the information below. If it is correct, click the "Certify and Submit" button. If you need to correct the information, click the "Back" button.

I certify that:

- I have reviewed the [Tuition Concession policy](#).
- The information on this request is accurate, to the best of my knowledge.
- I have attached appropriate documentation as required
- I understand that:
 - It is my responsibility to ensure the tuition, fees, and any applicable tax payments are appropriately made.
 - If I elect to take a course(s) at an institution other than Wake Forest University, they must be directly related to the essential functions of my position or department/office at Wake Forest University
 - I must maintain a 2.0, "C" average (or the equivalent) to continue qualifying for tuition concession.
 - If I already have an undergraduate degree (baccalaureate or equivalent), I am not eligible for tuition concession at other institutions.
 - Tuition refunds for cancellation or withdrawal must be made to Wake Forest University.
 - I must submit my tuition concession request within one semester following the semester during which I attend class(es).

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

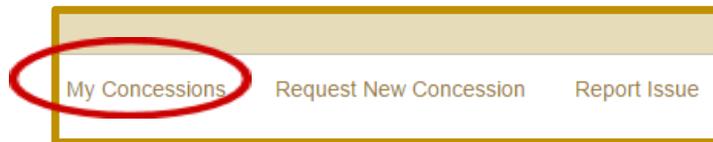
Once you have successfully submitted your tuition concession request, you may track it online by logging into WIN and accessing the online Tuition Concession tool.

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



A screenshot of a table titled 'Tuition Records'. The table has columns: Academic Year, Term, Institution, Count, Amount, Taxable, Requested, and Status. The first row shows data for the 2015/2016 academic year, Fall term, at Wake Forest University, with a status of 'HR'. The 'Status' cell is circled in red. Below the table are two buttons: 'New Concession for London' and 'Edit Student Information'.

Academic Year	Term	Institution	Count	Amount	Taxable	Requested	Status
2015/2016	Fall	Wake Forest University				06/03/2015	HR

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.