

ROCHESTER INSTITUTE OF TECHNOLOGY

Tuition Exchange Application and Recertification

Initial Application Recertification Academic Year: 20__ to 20__

Employee Name: _____ Employee No.: _____

Day Time Phone Number: _____ E-Mail Address: _____

For Initial Application Only: I have used TE for another child in the past: No Yes, if yes, please provide child's full name and approximate dates used: _____

CHILD INFORMATION

Full Name: _____ Last 4 digits of Soc. Sec. No.: _____

Relationship to Employee: _____ Date of Birth: _____

- Daughter Step-daughter Domestic Partner's daughter
 Son Step-son Domestic Partner's son
 Ward, employee has been child's legal guardian/custodian since ____/____/____

Child's tax status (Note: ex-spouse is the child's other parent):

- this child was reported as a dependent on my or my ex-spouse's most recent federal income tax return and is expected to be reported as a dependent on the current year's return.
 this child has not been reported as a dependent on my or my ex-spouse's federal income tax return

Permanent (home) Address: _____

Permanent (home) Telephone: _____ Email: _____

APPLICATION/CERTIFICATION INFORMATION

Check one box below and corresponding class year:

- applying for transfer/admission as a: freshman sophomore junior senior
 accepted for transfer/admission as a: freshman sophomore junior senior
 currently enrolled as a: freshman sophomore junior senior

NAME(S) OF COLLEGE/UNIVERSITY FOR APPLICATION/RECERTIFICATION

1. _____ 4. _____
2. _____ 5. _____
3. _____ 6. _____

EMPLOYEE SIGNATURE

I understand and affirm that

- RIT reserves the right to change, modify, audit, discontinue or terminate benefits at any time for any reason;
- Tuition Exchange is available for my eligible children under the terms of the Tuition Exchange benefit plan and subject to RIT's continued favorable exchange status with The Tuition Exchange, Inc.;
- If the benefit is taxable, I will receive an invoice from RIT for the taxes and I must pay RIT in full upon receipt of the invoice; my Form W-2 will be adjusted to include additional income for the waiver and taxes paid. If I fail to remit the taxes to RIT by the due date, I authorize RIT to withhold the amount due for taxes from my pay.
- I affirm that the child named above is eligible for TE and that I am required to submit a copy of proof of eligibility and tax status (refer to HR website for details). I understand that if I submit this form for a child who is not eligible that I will be in violation of RIT Policy which may result in ineligibility for TE and/or discipline up to and including termination of employment;
- I have read the plan information and understand and agree to the plan provisions.

Employee Signature

Date

Human Resources Department Use

Adj DOH: _____ HR Approval: _____ Date: _____

ROCHESTER INSTITUTE OF TECHNOLOGY

Information and Instructions for Tuition Exchange Application and Recertification

RIT participates in The Tuition Exchange, Inc., a reciprocal scholarship program for children of faculty and staff employed at over 600 participating institutions in the United States. The Tuition Exchange, Inc., a non-profit association, serves higher education by making careers at colleges and universities more attractive. Tuition Exchange Scholarships are not guaranteed; they are competitive awards and each participating institution sets its own eligibility criteria. Each institution is obligated to maintain a balance between students sent out on the exchange (exports) and students received on the exchange (imports). If this ratio of imports and exports becomes out of balance, RIT may restrict Tuition Exchange Scholarship certifications for RIT exports (children of RIT employees going to other schools).

RIT Eligibility: The TE benefit is available to the children of regular full-time employees with at least five (5) years of full-time service on or before the day after Labor Day (Tuesday) in the September of the academic year for which TE application is made. Previous extended part-time service can be counted as one-half a year toward the five (5) year full-time service requirement. Scholarships are for full-time undergraduate study during the regular academic year.

Because the import-export ratios are currently favorable, we have increased the current limit of 8 semesters to 12 semesters per family; this increase will be reviewed on a rolling five-year basis and may be adjusted accordingly. The base line eligibility continues to be 8 semesters per family. If both spouses/partners of a couple work at RIT, they are eligible for eight semesters each, for a total of 16 semesters per family.

Application Process: Colleges and universities set their own policies and procedures for awarding Tuition Exchange Scholarships. Applying for a Tuition Exchange Scholarship is easy. Follow the normal admissions process for the school(s). In addition, complete a Tuition Exchange Application and Recertification form and submit to the Human Resources Department. HR will certify your eligibility and forward the application to RIT's Tuition Exchange Liaison Officer, Edward A. Lincoln, Assistant to the Vice President, Enrollment Management and Career Services ((x5-5502/v and x5-7487/TTY, e-mail: ealfad@rit.edu). RIT's Liaison Officer will certify the application and send it directly to the school(s) considering the candidate. Make sure you apply for admission and Tuition Exchange by each school's deadline -- these deadlines do vary from school to school. For more details on the process and a list of participating schools, check out the Scholarship Award Process on the Tuition Exchange web site (<http://www.tuitionexchange.org>).

Recertification Process: You should complete the Tuition Exchange Application and Recertification form each spring to recertify the TE benefit for the upcoming academic year. Submit the completed form to the Human Resources Department and HR will certify your eligibility and forward the form to RIT's TE Liaison Officer.

Taxability of the TE Scholarship: Generally, TE Scholarships are not taxable. However, there are certain cases according to the Internal Revenue Code when the TE Scholarship will be treated as taxable income to you. The scholarship would be taxable if the child

1. is your child and is not reported on your or your ex-spouse's (child's other parent) tax return;
2. is your spouse's child (your step-child) and is not reported on your spouse's or your spouse's ex-spouse's (child's other parent) tax return; or
3. is your domestic partner's child who is not reported on your tax return.

If the TE Scholarship is taxable, the RIT Controller's Office will send you an invoice for the taxes you owe and you must pay RIT; your Form W-2 will be adjusted to include additional income for the TE Scholarship and taxes paid. If you fail to remit the taxes to RIT by the due date, RIT will withhold the amount due for taxes from your regular paycheck. NOTE: you will be billed three times during the academic year, with each bill for one-third of the full annual amount.