

Bethel University Tuition Benefit Request Form

2009-2010

Instructions: Submit to Human Resources at least two weeks prior to the beginning of the term. Employees must re-apply each academic year. This benefit does NOT apply to the cost of private instruction, music lessons, tuition for non-credit special programs and workshops, independent study, activity and other special fees. Dependent children enrolled in graduate programs are not eligible for tuition benefit. For a complete description of the Employee Tuition Benefit, including summer school and internships, see the Employee Handbook (http://bethelnet.bethel.edu/hr/handbook/main-page).

Part A (All employees must complete)

Name of Employee: _____ Employee ID# (required): _____

Supervisor's Authorization:

Note: Supervisor/Department Head's Approval is required only if student is the eligible employee. Signature is NOT required when student is the "spouse" or "dependent child" of the eligible employee. Provost or dean signs for faculty.

Approved by _____ Date _____

Part B (All employees must complete)

Name of Student: _____ Student Bethel ID# or SS# (required): _____

Student's relationship to employee (check one): [] Self [] Spouse* [] Dependent child

[*Will spouse receive tuition assistance from her/his employer? [] Yes [] No

If yes, list employer's name _____ and the amount of the tuition assistance per term _____.]

Intended Degree: [] None [] Licensure [] Certificate [] Associate [] Baccalaureate [] Master (type _____) [] Ed.D/DMin

Tuition Classification (check one): [] Audit [] Licensure [] Undergrad [] Post-BA Undergrad [] Grad

Enrollment Plans (REQUIRED: select your school, and indicate the number of credits you will take each term):

[] College of Arts & Sciences (CAS):

Number of Credits Fall '09 _____; Interim '10 _____; Spring '10 _____; Summer '10 _____

[] College of Adult & Professional Studies (CAPS): Cohort _____; Start date _____;

Number of Credits Fall '09 _____; Spring '10 _____; Summer '10 _____

[] Graduate School (GS): Cohort _____; Start date _____;

Number of Credits Fall '09 _____; Spring '10 _____; Summer '10 _____

[] Seminary: Delivery system (check one): [] Traditional [] SemPM [] InMinistry [] D.Min.

Location: [] St. Paul [] San Diego [] Maryland/Washington DC [] New England [] New York [] Pennsylvania

Number of Credits Fall '09 _____; Winter '10 _____; Spring '10 _____; Summer '10 _____

Part C (Complete Part C when benefit is for employee's dependent child; circle one option for each question)

- 1. What is the student's relationship to employee (circle one): • Natural or adopted son • Natural or adopted daughter • Stepson • Stepdaughter • Foster child
2. Yes No Did you claim your dependent child as an exemption on your 2008 Federal income tax return?
3. Yes No Does your dependent child have the same principal residence as you for more than half the year?
4. Yes No Is your dependent child a U.S. citizen?
5. Yes No Does your dependent child reside in the U.S.?
6. Yes No Did your dependent child provide more than half of her or his own support during the 2008 tax year?
7. Yes No Will your dependent child be under age 24 during calendar year 2009 AND 2010? Please state your child's birthdate: _____
8. Yes No Is your dependent child currently married OR do you anticipate your child will be married during calendar year 2009 or 2010? If yes, please contact Human Resources for further information on eligibility.

Be sure to sign your form! (on reverse)

Part D (All employees must complete; circle one)

Yes **No** 1. Is the student interested in Federal student loans?
 Go to Part G Go to Part E

Part E (Employees who answered no to part D must complete; circle one option for each question)

Yes **No** 1. Does the student have a baccalaureate degree?
 Go to Part F Go to Q. 2

Yes **No** 2. Is the student enrolled in a graduate or seminary program?
 Go to Part F Go to Q. 3

Yes **No** 3. Is the student auditing all classes?
 Go to Part F Go to Q. 4

4. Please enter your family's data below (Must complete 4a, 4b, 4c, and 4d)

4a. _____ Household Size (total # of people in household with parent[s] and all dependent children)

4b. _____ Number of children in college in 2009-2010 (enrolled at least half-time, not including PSEO students, and not including parents)

4c. \$_____ Please enter a dollar amount from the chart on the right to determine your "Threshold Income" (based on your household size and number in college, items 4a and 4b above). (For example, a household size of 5 with 1 in college would have a "Threshold Income" of \$75,000).

(4c) "Threshold Income":

(4a) Household Size	(4b)		
	1 in College	2 in College	3 in College
1	\$ 55,000	NA	NA
2	\$ 67,000	\$ 94,000	NA
3	\$ 69,000	\$ 98,000	\$ 125,000
4	\$ 74,000	\$ 103,000	\$ 126,000
5	\$ 75,000	\$ 105,000	\$ 131,000
6	\$ 81,000	\$ 108,000	\$ 136,000
7	\$ 85,000	\$ 114,000	\$ 140,000
8	\$ 89,000	\$ 117,000	\$ 143,000
9	\$ 93,000	\$ 120,000	\$ 148,000

4d. Is your household's 2008 Adjusted Gross Income (AGI) as reported on your federal tax return *greater than or equal to* your "Threshold Income" (item 4c above)? **Yes** **No**
 Go to Part F Go to Part G
 (be sure to include both employee *and* spouse income in your calculation!)

Part F – NO FAFSA REQUIRED (Carefully read the information in this section and then continue to part H.)

If you have been directed to Part F by your response to one of the questions above, **you are not required to complete the FAFSA** as a requirement for receiving tuition benefit. This completed tuition benefit form is all you are required to submit.

Part G – FAFSA REQUIRED (Carefully read the information in this section and then continue to part H.)

If you have been directed to Part G by your response to one of the questions above, **you must complete the FAFSA** as a requirement for receiving tuition benefit. Students that are required to complete the FAFSA must complete the full financial aid process by submitting the following additional documents to the Office of University Financial Aid:

- 2009-2010 FAFSA (apply online at www.fafsa.ed.gov; Bethel's FAFSA code is 002338)
- 2009-2010 Bethel University Financial Aid Application (available at <http://www.bethel.edu/finaid>)

Part H (All employees must complete)

Employee Signature: _____ Date Signed: _____
 My signature indicates that all the information reported is true and complete

Submit all completed applications to the Office of Human Resources.

Office Use Only:

<p>Office of Human Resources</p> <p>Is the employee eligible for tuition benefit for the full 2009-2010 academic year? (Check one)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partial Year, Effective: ____/____/____</p> <p>Maximum tuition grant _____ %</p> <p>Approved by _____ Date _____</p>

<p>Office of University Financial Aid</p> <p># Terms of eligibility used prior to this application: _____</p> <p>Tuition _____ x _____ % = Max Benefit _____</p> <p>FA Staff person _____ - Pell grant _____</p> <p>_____ - MN state grant _____</p> <p>_____ - Spouse TUIB _____</p> <p>Date _____ = TUIB _____</p>

(forward to Office of Financial Aid after certifying eligibility)