

If you are a UCI graduate student (except UCI law students and UCI medical school residents), please contact the UCI Graduate Division at (949) 824-4611. If you are a UCI undergraduate student, please contact the Office of Financial Aid and Scholarships at (949) 824-8262.

Regular employees who meet the admission requirements of the University may be eligible for a two-thirds reduction of both the University Registration Fee and the Educational Fee. Please refer to [University of California Policy PPSM-51](#) for more information.

Part I Employee Information

Employee Name	Employer No.		
Department	Are you an active employee?	Yes	No
Job Title	Appointment Percentage		

Have you been previously reimbursed educational expenses this calendar year? Yes No
If yes, please provide the amounts and dates previously reimbursed.

Please provide a brief description of your job duties.

Part II Course Information

Course Title Institution:

Provide a course description or attach a course syllabus if available.

Part III Job-Related Courses

For more information regarding [University of California Policy T-182-77](#), please click on the link.

This section should only be used if the course you are taking is job related. If the course is a non-job related course, please proceed to Part IV. Your educational expense reimbursement can be considered tax free if they maintain or improve skills required in your current job (*University of California Policy T-182-77, Section V, Part D, Section 3*).

If it has been determined that your educational expenses are not related to your job, only the first \$5,250 for a calendar year will be a tax free reimbursement (*University of California Policy T-182-77, Section V, Part D, Section 2*).

Is the course required by the University, or by law or regulations, to enable the employee to keep his/her current salary or job?	Yes	No
Does the course maintain or improve skills required in the employee's present job?	Yes	No
Is the course required to meet the minimum requirements of the employee's present job?	Yes	No
Is the course part of a program of study that will lead to qualifying the employee for a new trade or business?	Yes	No

Please explain in detail how the course you are taking is related to your job. (Attach separate sheet if necessary)

Part IV Tax Determination

Department Use

If the course is a non-job related course, educational assistance is tax-exempt up to \$5,250 per calendar year.

Amount of requested educational assistance		Winter
Amount of previous assistance in current year		Spring
Less maximum annual exempt amount	- 5,250	Summer
Taxable educational assistance		Fall

I understand that any taxable educational assistance is subject to federal and state income tax withholdings and OASDI and Medicare deductions. I authorize the Payroll Office to withhold all applicable taxes from my earnings.

Signature of Employee

Date

Signature of Supervisor or Department Head

Date