



Tuition Reimbursement Tax Questionnaire

Complete the Tuition Reimbursement Tax Questionnaire if there is a chance your annual Tuition Reimbursement requests submitted could exceed the \$5,250 annual nontaxable limit. Send the completed Tuition Reimbursement Tax Questionnaire to HR Connections, 6POB or HR Connections, PO Box 5555, Bartlesville, OK 74005 in order to obtain a predetermined tax ruling **prior** to enrollment.

Is the course job related? Yes No

- If a course is job-related, any reimbursement or direct payment by the employer is not taxable income to the employee.

If yes to the above, please indicate how the proposed advanced degree program relates to your current position and job duties.

Is the course taken toward training for a new profession? Yes No

- **Example:** a legal assistant's courses at a law school may improve skills used on the job, but they will also lead to a new profession. Therefore, reimbursement for direct payment by the employer would be taxable income and subject to all employment tax withholding. However, courses taken toward a Masters of Business Administration degree would be non-taxable if job-related and employee's current job requires significant management, interpersonal and administrative skills.

What advanced degree are you pursuing?

Please provide a description of the proposed advanced degree program (for example, particular focus and/or classes).

Please give **detailed** description of your current job duties without acronyms or abbreviations (please draft this description for an audience outside of your area of expertise):

Employee Number

Name (Print)

Date

