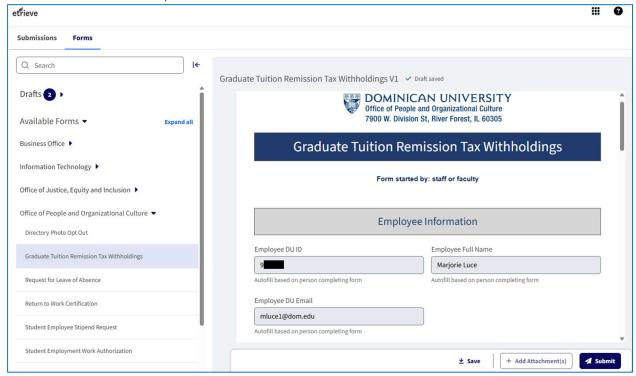
Softdocs etrieve - Form Instructions

OPC Graduate Tuition Remission Tax Withholdings

Direct link to form: https://dom.etrieve.cloud/central/forms/140



Alternate access:

- 1. Open Softdocs etrieve: https://dom.etrieve.cloud/central
- 2. Click on "Forms"
- 3. Scroll down to "Office of People and Organizational Culture" section (or search form name in box at top)
- 4. Click on desired form

Workflow process:

- 1. The employee starts/opens the form and their DU ID, full name, & email autofill.
- The employee completes all sections and signs.
 - a. Use Name Search to add Student Information.
 - b. Choosing "Self" as "Student Relation to Employee" displays a "Calculation for Self" section.
 - c. Choosing "Spouse" or "Child" as "Student Relation to Employee" displays a "Calculation for Spouse/Child" section instead.
- 3. The employee receives an email confirming submission.
- 4. OPC approves or denies and completes "office only" area.
- 5. The employee receives an email of approval or denial.
- 6. The form files in Softdocs etrieve Content (document repository).

Softdocs etrieve issues: Please submit a Support Ticket to Information Technology https://support.dom.edu/TDClient/2074/Portal/Requests/TicketRequests/NewForm?ID=CneTR2sN8Jk & RequestorType=Service

Example screenshots:



Graduate Tuition Remission Tax Withholdings

Form started by: staff or faculty

Employee Information

Employee DU ID

9

Autofill based on person completing form

Employee Full Name

Marjorie Luce

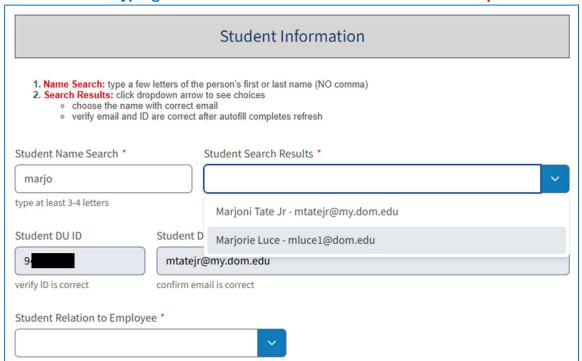
Autofill based on person completing form

Employee DU Email

mluce1@dom.edu

Autofill based on person completing form

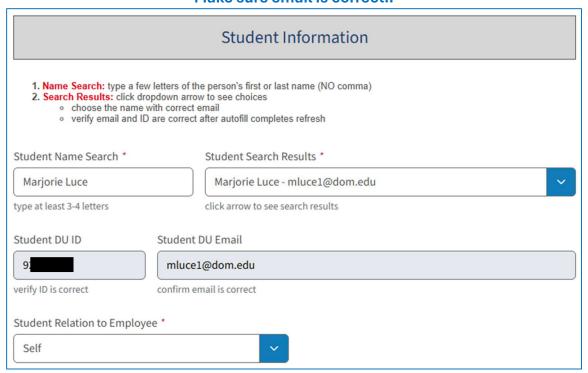
Preview after typing some letters in search box with results in dropdown box



An email will autofill after you type in search term.

Once you choose the correct name from dropdown list, the email will refresh.

Make sure email is correct!!



Choosing "Self" as "Student Relation to Employee" displays a "Calculation for Self" section

Taxable Deemed Income

The value of tuition remission for graduate level coursework for you, a spouse or dependent is deemed taxable income by federal law. You may be liable for tax withholdings on the value of the tuition remission you receive during the given tax year. Determine your taxable deemed income for the given tax year below.

If you need assistance determining the **\$ value per course**, please reference the <u>Tuition</u>, <u>Fees and Expenses</u> Information on Dominican's Student Accounts website.

Calculation for Self:	
# of tuition remission course(s) per tax year *	\$ value per course *
Deemed Income	
"Deemed Income" minus "Federal Allowance for Self" of \$5,250 equals "Taxable	Deemed Income"
Taxable Deemed Income For Tax Year	

No form needs to be submitted if Taxable Deemed Income For Tax Year calculation is \$0 or a negative amount. Negative calculations are NOT refunds.

Please spread the total deemed income out over the remaining payrolls in this tax year. This will cause tax to be withheld from my paycheck. If you are paid monthly there are 12 payrolls in a year and if you are paid biweekly there are 26 payrolls.

Choosing "Spouse" or "Child" as "Student Relation to Employee" displays a "Calculation for Spouse/Child" section

Taxable Deemed Income	
The value of tuition remission for graduate level coursework for you, a spouse or dependent is deemed taxable income by federal law. You may be liable for tax withholdings on the value of the tuition remission you receive during the given tax year. Determine your taxable deemed income for the given tax year below.	
If you need assistance determining the \$ value per course , please reference the <u>Tuition, Fees and Expenses</u> Information on Dominican's Student Accounts website.	
Calculation for Spouse/Child (Dep or Non-Dep):	
# of tuition remission course(s) per tax year * \$ value per course *	
\$	
Taxable Deemed Income For Tax Year	
Please spread the total deemed income out over the remaining payrolls in this tax year. This will cause tax to be withheld from my paycheck. If you are paid monthly there are 12 payrolls in a year and if you are paid biweekly there are 26 payrolls.	
Notes	
votes	



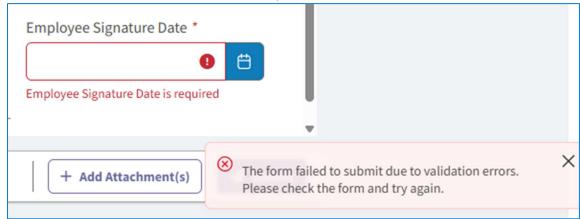




DON'T FORGET TO SUBMIT!

Form errors:

All boxes with red asterisk must be completed to "submit" the form.



Draft form:

A draft form will be saved automatically and can be resumed at any time (or deleted).

