

Policy: Tuition Waiver & Tuition Exchange Programs	Policy No: I-3.6
Policy Owner(s): Human Resources	Original Date: 3/10/2006
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- I. **POLICY:** John Carroll University (JCU) offers tuition waiver and tuition exchange programs to full-time, benefits-eligible employees, eligible retirees, and/or their spouses and dependent children.
- II. **PURPOSE:** To explain the requirements, responsibilities and parameters of the tuition waiver and tuition exchange benefit programs and the conditions under which these benefits might be offered and forfeited.
- III. **SCOPE:** All employees and Eligible Retirees of John Carroll University
- IV. **DEFINITIONS:**

Dependent Child: A current full-time employee's or Eligible Retiree's biological, step or adoptive child who is 26 years of age or younger and financially dependent upon their JCU-employed or retired parent. Financial dependence is defined under the Internal Revenue Service regulations and is established if the child is claimed as such on the employee's federal income tax return in that year tuition waiver is sought. In the instance of a death of an employee with three (3) or more consecutive years of full-time service, children 26 years of age or younger and who are dependent on the surviving spouse may be considered a Dependent Child under this policy in the discretion of the Divisional Vice President and Human Resources.

Eligible Retiree: A former John Carroll University full-time employee who meets any one of the following conditions:

1. Retired from service with the University at age 62 or older and five (5) years of full-time continuous service; or
2. Retired from the University under the terms of the 2017 Staff Voluntary Early Retirement Program, or
3. Terminated employment because of total disability and completed at least five (5) years of full-time continuous service.

Spouse: A legally married spouse as recognized under the laws of the State of Ohio.

V. ELIGIBILITY:

- A. Full-time employees, their Spouses and their Dependent Children are eligible for tuition waiver the first full semester (or summer session) following the employee's hire date. Part-time Faculty who have taught for five (5) cumulative semesters and are actively teaching are eligible to take one (1) course every twenty-four (24) months provided they are actively teaching during the time they are taking the course. Waivers for Part-time Faculty will be forwarded to the Provost and Academic Vice President's Office for approval.
- B. An employee who terminates employment during the first half of the semester or first half of summer session will forfeit their full tuition waiver for that semester or session. Employees in this situation are required to inform Human Resources.
- C. Eligible Retirees as defined in this Policy, their Spouses, and their Dependent Children are eligible for tuition waiver.
- D. Upon retirement, an Eligible Retiree must identify their Spouse and Dependent Children in order to qualify for future tuition waiver and tuition exchange program benefits under this policy.
 - 1. Upon notification to the University of retirement, each Eligible Retiree will be asked by Human Resources to identify by name and social security number any Spouse or Dependent Children who may be eligible for tuition waiver or exchange benefits as the dependent of an Eligible Retiree.
 - 2. Documentation verifying eligibility of the Spouse and Dependent Children will be required at the time of application for the tuition waiver or tuition exchange benefit.
- E. Tuition may be waived for Dependent Children and the surviving un-remarried spouse of JCU employees who died while employed by the University and accumulated three (3) or more consecutive years of full-time service, in the discretion of the Divisional Vice President and Human Resources.
- F. Applicants for tuition waiver must meet the established admission and academic requirements of the University. The admission decision is separate from the tuition waiver eligibility.

VI. PROCESS & PROCEDURES:

- A. Tuition waiver will be granted if the appropriate completed application forms (i.e. Tuition Waiver/Employees form or Tuition Benefit Application for Spouse/Dependents form and/or Tuition Exchange Programs Application) are submitted to the Human Resources

Department by the designated deadlines for each semester/summer session. Waiver forms are available on the following website:
<http://sites.jcu.edu/hr/pages/hr-forms-and-documentation-2/>

- B. Employees and Eligible Retirees must verify on the waiver application that the employee, Spouse and/or Dependent Child meets all of the eligibility requirements for tuition waiver, including financial dependence as applicable for each year the tuition waiver is requested.
 - 1. Documentation required to verify an eligible Dependent Child include the child's birth certificate and the applicable portion of the employee's (or Eligible Retiree's) current Federal Form 1040 U.S. Individual Tax Return.
 - 2. Documentation required to verify an eligible Spouse includes a valid marriage certificate and the applicable portion of the employee's current Federal Form 1040 U.S. Individual Tax Return. If the employee's Spouse files a separate Federal Form 1040 U.S. Individual Tax Return, a copy of the applicable portion of that current return must also be submitted at time of application.
- C. Misrepresentation of eligibility for tuition benefits will result in permanent revocation and the obligation to repay tuition benefits for the employee, Eligible Retiree, Spouse, and/or Dependent Children.
- D. The waiver will be denied if all required tuition waiver request forms and documentation are not submitted or submitted after the designated due date.
- E. If a child is not claimed as a tax dependent but is dependent upon the employee or Eligible Retiree, eligibility for tuition waiver may be requested in writing and established as an exception. Proof of relationship also will be required. In order to qualify as an exception, a written explanation -- providing evidence of the child's dependence on the employee or Eligible Retiree and the reasons for the request -- must be submitted to and approved by the Human Resources Department.
- F. To be eligible for tuition waiver, JCU employees, Eligible Retirees, Spouses and Dependent Children must complete the appropriate financial aid forms to determine federal and/or state eligibility. Tuition waiver will be reduced in accordance with availability of financial aid funds as determined by the Financial Aid Office. In addition, JCU tuition waivers must be reimbursed should any Spouse or Dependent Child be eligible for outside tuition waiver (i.e., through another employer).

VII. SPECIFIC TERMS:

- A. Tuition waiver for eligible full-time employees is limited to two (2) courses during any one semester and one (1) course during each summer session.
- B. Course attendance may not interfere with or conflict with work schedules. Therefore, unless an employee regularly works an evening schedule, tuition waivers will normally not be granted for daytime classes. The Divisional Vice President and the Human Resources Department must approve exceptions to the daytime restriction.
- C. Tuition up to a full-time course load (18 credit hours) is waived for the Spouse and Dependent Children of eligible full-time employees.
- D. Under certain circumstances, the tuition waiver benefits may be taxable income to the employee, as provided by federal and state law. All eligible employees, Eligible Retirees, Spouses and Dependent Children should consult their tax advisors for the most recent information about the taxability of tuition waivers.
- E. Fees are waived for eligible, full-time employees and their Spouses. However, Dependent Children will be responsible for specified fees and charges. In addition, monthly pre-payment plan fees or deferred payment fees arising from payment of such things as Dependent Children room and board are not waived. Waiver covers only tuition and fees, if applicable. Any other costs (i.e. housing, expenses etc.) are the responsibility of the enrolled student and/or eligible employee and must be paid in accordance with JCU policy.
- F. Tuition and/or fees for non-credit programs (i.e., continuing education) will not be waived for Spouses or Dependent Children. Such tuition and/or fees will not be waived for eligible employees unless the course or program is determined by the employee's direct supervisor to be job-related and beneficial to the employee's work at JCU. Non-credit waivers must be pre-approved by the Divisional Vice President and the Human Resources Department.
- G. The tuition waiver applies only to courses listed in the official John Carroll University undergraduate and graduate bulletins. Programs including, but not limited to, study abroad, school-based M.Ed, distance learning education and other special arrangement programs requiring payment to a non-JCU entity are not eligible for tuition waiver under this policy.
- H. Tuition will not be waived to the extent that other programs pay for tuition. Recipients of tuition benefits are expected to apply for all federal and state funding available. All employees, Spouses, and

Dependent Children utilizing this benefit are expected to file the appropriate financial aid forms to determine outside aid eligibility. Duplication of tuition waiver for any course must be reimbursed to the University from sources outside the University. Further information on aid procedures is available in the Financial Aid Office.

VIII. TUITION EXCHANGE PROGRAMS:

- A. Eligible full-time employees may participate in any exchanges in which the University participates, including the Jesuit Faculty and Staff Children Exchange Program (FACHEX), the Council of Independent Colleges Tuition Exchange Program (CIC-TEP) and the Tuition Exchange Program (TEP).
- B. Receipt of tuition benefits via the University's sponsored exchange programs is highly competitive and limited by overall participation in the exchange programs as determined by the participating institutions. Access to tuition benefits through any exchange program is in no way guaranteed, even if the student is admitted to the participating exchange institution.
- C. The University's continued participation in any tuition exchange program is not guaranteed. The University reserves the right to discontinue, add or alter participation in any tuition exchange program.
- D. JCU's current participation in exchange programs is as described below:
 - 1. The University participates in a Jesuit Faculty and Staff Children Exchange Program (FACHEX), which is an undergraduate tuition remission program for Dependent Children of eligible full-time employees. It permits a limited number of children eligible for tuition at the home institution to receive the same benefit from 26 other Jesuit colleges and universities. The benefits are for the remission of tuition only.
 - a. Students participating in the program are expected to pay all fees and room and board charges assigned by the institution receiving the student. Generally, the tuition remission pertains to the regular sessions only, and not summer sessions.
 - b. Under certain circumstances, the receiving institution may grant waivers for summer session tuition. This benefit pertains to full-time students only.
 - c. Tuition benefits are available under the FACHEX program according the terms and conditions outlined by the FACHEX program.

- d. Additional information about FACHEX, including a list of participating schools, is available through the Office of Financial Aid.
2. The University participates in the Council of Independent Colleges Tuition Exchange Program (CIC-TEP). Eligible full-time employees can apply for tuition-free education for their eligible dependents at over three hundred (300) colleges and universities around the country.
 - a. Tuition benefits are available under the CIC-TEP program according the terms and conditions outlined by the CIC-TEP program.
 - b. Information regarding this benefit can be accessed at www.cic.edu or by contacting the Office of Financial Aid.
 3. The University participates in the Tuition Exchange Program (TEP). Eligibility is determined by the employing (home) university. Tuition benefits are available under the TEP program according the terms and conditions outlined by the TEP program. A list of participating institutions can be found at the following website: <http://www.tuitionexchange.org/>
 - a. Tuition benefits are available under the TEP program according the terms and conditions outlined by the TEP program.
 - b. Information regarding this benefit can be accessed at <http://www.tuitionexchange.org/> or by contacting the Office of Financial Aid.
- B. To determine eligibility for FACHEX, CIC-TEP or TEP, a waiver form must be completed. These forms are available at <http://sites.jcu.edu/hr/pages/hr-forms-and-documentation-2/> or in the Human Resources Department.