



## **POLICY MANUAL**

### **BENEFITS**

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**Number 350**

**Subject: Educational Benefits**

**Covered Employees: Budgeted Employees**

**Date of Origin: January 24, 1997**

**Effective Date of Last Revision: May 23, 2008**

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#### **350.1 POLICY**

The University encourages all individuals associated with Utah State University to continue their educational development. To assist in that regard, the University has established several educational benefit programs. Each program has unique eligibility and participation requirements.

#### **350.2 PROCEDURES**

##### **2.1 Utah State University Courses for Credit**

Courses at Utah State University may be taken for course credit by individuals who meet the eligibility requirements.

According to the stipulations described below, salaried employees who are budgeted 75% time or more are eligible to participate. In addition, their spouses and dependent children (under the age of 26 and single at the time of registration) and all Utah State University retirees, their spouses, and dependent children (under the age of 26 and single at the time of registration), are eligible to participate.

(1) Employees qualify after 3 months of service working 75% time or more. The 3-month waiting time must be completed on or before the last eligible day that fees are due in the applicable semester.

(2) Dependent children qualify for benefits after the related University employee has been employed in an eligible position for 2 years (working 75% time or more).

(3) Spouses qualify immediately for this benefit. The eligibility period must be completed on or before the last day fees are due in the applicable semester.

(4) Spouses and dependent children of deceased University employees who were eligible when the employee died will continue to be eligible under the provisions of this policy.

(5) Retirees, their spouses and dependent children qualify when the retiree meets the minimum definition of retirement as stated in Policy 361.3.1.

The educational benefit for individuals who meet the eligibility requirements is a reduction in tuition by 50% of the appropriate rate (in-state or out-of-state depending on official residence) for the courses being taken. This reduction is for both day and night courses offered and described in the *University Bulletin*.

Employees, retirees, and spouses do not have to pay non-tuition fees except for the following, which will be paid at the standard rate: special lab and class fees, graduation fees, correspondence or home-study fees, noncredit workshops, conferences, institutes, special field trip fees, and fees for most courses offered by the Division of Continuing Education.

If, while taking University classes, the eligible person desires student privileges that require fees (i.e., activity fees, health fees, etc.), activity fees must be paid.

Dependent children taking University courses must pay full non-tuition fees.

## **2.2 Utah State University Courses Taken for Audit**

All budgeted employees working 50% time or more, their spouses, and University retirees and their spouses qualify for auditing University courses without a fee or waiting period. Dependent children do not qualify for this benefit.

Spouses of deceased University employees who were eligible for this benefit when the employee died will continue to be eligible.

Retirees and their spouses qualify for this benefit when the retiree meets the minimum definition of retirement as stated in Policy 361.3.1.

## **2.3 Limitations**

Full-time employees (95% time or greater) may register for a maximum of 6 credit hours per semester, to be taken during the employee's normal working hours. This limit applies to the combination of courses taken for credit or audit. Employees working less than full-time may register for the following credit hours, to be taken during the employee's normal working hours:

<u>Percent of Time Working</u>	<u>Credit Hours Allowed During Normal Working Hours Per Semester</u>
95 - 100 %	6 hours
85 - 94 %	5 hours
75 - 84 %	4 hours
less than 75%	ineligible

Courses taken by employees during regular working hours may not interfere with the operation of the employee's department, and the employee must have the permission of his/her supervisor or department head. Regular hours of work missed by classified employees for class attendance must be made up during the same week in which they are missed.

When the same course is offered in both day and night sessions, the employee is encouraged to enroll in the night course.

Qualified academic year base employees who meet waiting period requirements are not restricted by the limitations above during the period of the year in which they are not working full-time (normally the summer semester).

Qualified employees are not restricted by the limitations above for courses that are to be taken during non-working hours.

## **2.4 Admissions and Registration Procedures**

All individuals who want to participate in the educational benefits program must apply and be accepted for admission to the University using the regular admission guidelines.

All individuals must follow the normal registration procedures of the University. The applicant must complete the Application Form for Tuition Reduction available at the Office of Human Resources website. When properly completed, the form is to be presented at the Cashier's Office when fees are paid to receive the benefits described in this policy.

## **2.5 Termination While Attending Classes**

Employees who terminate employment with the University for reasons other than retirement or death disqualify themselves, their spouses, and dependent children from participating in future educational benefits programs.

When employment ends, the employee, spouse, or dependent child who is in the process of taking a University course with reduced tuition fees under the guidelines of this policy will be allowed to complete that course. Any future courses taken will require payment of the fully applicable tuition costs.

Employees on leave without pay (LWOP) for more than 6 months do not qualify for the benefits described in this policy. Spouses and dependent children of employees on LWOP are also disqualified from the educational benefits. Employees on sabbatical or other approved leave with pay, their spouses, and dependent children, are eligible for educational benefits described in this policy.

## **2.6 Financial Limitations**

The employee/spouse/dependent waiver is a benefit of employment and provides a 50% waiver of tuition. This benefit is not reduced when a student receives other tuition waivers, except that combined tuition waivers cannot exceed 100% of tuition charges for a given term. For the purposes of this policy, a waiver is any funding that is restricted to the payment of tuition.

## **2.7 Appeal Process**

Refer to Policy 325.

## **2.8 Taxation**

Certain educational benefits received by employees, their spouses, and dependent children may be taxable under current IRS rules. If the IRS rules that all or a portion of these benefits are taxable, the University will add the value of the benefit received to the employee's income and will withhold appropriate taxes for the amount of the benefit.

## **350.3 RESPONSIBILITY**

### **3.1 Department Heads and Supervisors**

Responsible to administer this policy for employees within their departments while considering the needs of the department.

### **3.2 Office of Human Resources**

Responsible to assist department heads and supervisors in administering this policy.

### **3.3 Employees**

Responsible for getting permission from their supervisors to take advantage of the University's educational benefits. If taking courses during regular working hours, employees need to coordinate course times with supervisors to reduce interference with the operation of the department. All employees must follow the normal registration procedures.