

EMPLOYEE TUITION AND FEE POLICY

I. Summary

Under policy guidelines established by the University of Louisiana System (“UL System”) under PPM FB.IV.V.O-1a, as a benefit for all eligible employees of the institutions within the UL System (“Employees”), Employees and their spouses and dependent children (“Spouse” and “Dependent Children”) may enroll at any institution within the UL System for undergraduate coursework at a reduced tuition, plus certain applicable fees (the “benefit”).

Each UL System institution, as a host institution, has some discretion to establish additional benefit eligibility guidelines and procedures specific to that host institution. Any full-time Employee applying for the benefit of the tuition reduction and waiver of certain fees at a UL System institution should refer to the policy and procedures for the benefit as offered at that particular host institution.

This policy (“Policy”) is specific to the benefit of tuition reduction and waiver of certain fees offered to Employees, Spouses, and/ or Dependent Children for enrollment in a degree program offered by the University of Louisiana at Monroe (“ULM”) as host institution.

II. Applicability:

The benefit applies to courses taken in the traditional classroom setting as well as on-line courses. Employees and dependents are eligible to use the tuition waiver for courses in eULM degree plans, however, the eULM tuition waiver will be not be greater than the tuition waiver amount associated with the “face to face” class hour equivalent. Students enrolled in eULM degree programs prior to July 1, 2015 will maintain the same tuition waiver benefit associated with eULM prior to the implementation of the new policy.

All employees and dependents must be pursuing a degree. Employees that can demonstrate a direct benefit to their job performance may request permission to use the waiver to take a class not in a degree program. Permission must be granted by the appropriate VP and the President.

Undergraduate Degree Program

ULM extends the benefit as set forth below to eligible Employees, Spouses, and/ or Dependent Children who do not already possess an undergraduate degree for undergraduate enrollment up to a maximum of 140 earned credit hours in a degree program offered by ULM as host institution. The benefit can be applied to full or part-time enrollment for the Spouse or Dependent. As indicated below, the benefit can be applied to 6 credit hours per semester for Employees.

Employees, Spouses, and/or Dependent Children may apply the tuition reduction benefit to obtaining an Associate’s degree. If after obtaining the Associate’s degree, and assuming continued eligibility, the Employee/ Spouse/ Dependent Child seeks to pursue a Bachelor’s degree, then the Employee/ Spouse/ Dependent Child may apply the tuition reduction benefit to credit hours toward the Bachelor’s degree. However, the number of credit hours already earned by the Employee/Spouse/ Dependent for the associate’s degree will count toward the Policy’s 140 credit hour limit for a Bachelor’s degree.

The employee or dependent waiver may not be used for auditing or “sitting in” classes during work hours. The appropriate VP and President may make exceptions for employees getting CEU’s or certifications required in their field.

Graduate Degree Program (Master’s Level)

Under the Policy, an eligible ULM employee who does not already possess a Master’s level degree may apply the benefit to graduate coursework within a Master’s level degree program, up to a maximum of 36 earned graduate level credit hours (or required # of hours for a degree program), to obtain up to one Master’s degree from ULM. The benefit can be applied up to 6 credit hours per semester as indicated below.

Permission may be granted by the appropriate VP and the President to an employee who already has a Master’s degree from another university; to pursue a second Master’s degree that can be directly related to current job responsibilities.

This additional benefit for pursuit of a Master’s degree at ULM extends to eligible UL System employees. The benefit is not available to the Spouses or Dependent Children of ULM employees nor the Spouses or Dependent Children of UL System Employees.

III. Not Covered under the Benefit

For enrollment at ULM, the tuition reduction benefit is not available or applicable to the following:

- Pharm D;
- Pursuit of a second undergraduate degree;
- part-time Employees;
- Doctoral Programs;
- Post Baccalaureate Certificate/Post Master Certificate

IV. Employee Enrollment Limits on Benefit

Undergraduate Degree Program

Full-time Employees pursuing an undergraduate degree may register for up to six (6) undergraduate level credit hours per semester at the reduced tuition and fees set under this Policy. “Per semester” includes credit hours earned for courses held during terms that occur within the semester, including but not limited to, Winter Session (which is calculated as part of Spring Semester for the purpose of credit hours), Maymester (which is calculated as part of Summer for the purpose of credit hours), and the 1st and 2nd eight (8) week terms within any given semester. If the Employee’s enrollment exceeds 6 credit hours in a given semester, then the additional credit hours will be billed at the full tuition and fee rates.

Graduate Degree Program

Active, full-time ULM employees pursuing a Master’s degree may register for up to 6 graduate level credit hours per semester at the reduced tuition and fees set in the Policy. “Per semester” includes credit hours earned for courses held during terms that occur within the semester, including but not limited to, Winter Session (which is calculated as part of Spring Semester for the purpose of credit hours), Maymester (which is calculated as part of Summer for

the purpose of credit hours), and the 1st and 2nd eight (8) week terms within any given semester. If the ULM employee's enrollment exceeds 6 graduate level credit hours in a given semester, then the additional credit hours will be billed at the full graduate tuition and fee rates.

System Employees' Spouses and/ or Dependent Children may enroll at part-time or full-time status at the reduced tuition and fees set under this Policy and, except for the cap of 140 total earned credit hours, are not limited in the number of credit hours earned per semester, including terms that occur within the semester, including but not limited to, Winter Session, Maymester, and 1st and 2nd eight (8) week terms within any given semester.

V. Tuition Reduction and Fees Waived

Employees

Eligible Employees may register for up to six (6) hours per semester for a reduced charge of \$25.00 per credit hour, not to exceed \$150.00 for any undergraduate or, in the case of only ULM employees, graduate level course within a defined degree program, with the exception of per credit hour costs associated with eULM courses. In addition to tuition, Employees shall also be assessed all required state and federal fees, including fees established by the UL System Board of Supervisors, which include, but are not limited to the following fees: Academic Excellence Fee, Operational Fee, Technology Fee, Energy Surcharge Fee, and Facilities Fee which are pro-rated for part-time enrollees.

Spouses and Dependent Children

Spouses and Dependent Children of eligible Employees may register for full- or part-time enrollment in a defined undergraduate degree program for a reduced charge of \$25.00 per credit hour, not to exceed \$300.00, with the exception of the per credit hour costs associated with eULM courses. Spouses and Dependents shall be assessed the following fees: Academic Excellence Fee, Operational Fee, Technology Fee, Energy Surcharge Fee, and Facilities Fee and any and all student-assessed fees.

Current ULM fee information may be found on ULM's webpage for the Controller's Office.

VI. Initial Eligibility Determination Based on Employee Status

Employment Status of Employee:

(1) Active Employees:

(a) Must be employed full-time as of the first day of instruction for the semester; and

(b) Must remain employed through at least 60% of the semester in which the Policy's benefit is received for the Employee/ Spouse/ Dependent Child to avoid having to reimburse the University the full cost of tuition and fees for the enrollment that same semester, less any tuition and fee amounts already paid at the reduced rate. This reimbursement obligation shall apply to Employees who voluntarily separate from the UL System before the end of the semester; this requirement shall not apply to UL System employees who are terminated.

(2) Retired Employees:

Retired Employees and their Spouses/ and/or Dependent Children are eligible for the benefit if the Employee retired with 25 years or more of service in the UL System.

(3) Disabled Employees:

“Retired Employees” include those qualifying for disability retirement under the Louisiana State Employee’s Retirement System or the Teachers’ Retirement System of Louisiana.

(4) Deceased Employees:

Spouses and Dependent Children of deceased Employees shall be eligible for the tuition reduction provided:

- (i) Employee was in service to or retired from the UL System having served not less than 25 years of service in the UL System; and
- (ii) Spouse and/or Dependent Child was eligible for the reduction when Employee’s death occurred.

VII. Determination of Eligibility of Spouse/ Dependent Child for Benefit

(1) Eligibility Determined by Internal Revenue Code

In order for the Employee to receive the benefit for a child, the Employee must attest that the child for whom the benefit is sought qualifies as the Employee’s Dependent Child for tax purposes, according to the Internal Revenue Code,¹ in the given taxable year in which the benefit of tuition and fee reduction is sought under this Policy.

At time of application for the benefit, the Employee’s attestation that the Dependent Child meets the requirements set forth in the Internal Revenue Code is sufficient to provide the necessary proof of the relationship. Subsequent verification shall be required, as stated immediately below.

Additionally, for purposes of the UL System’s policy and this Policy, a Dependent Child of divorced parents is treated as the dependent child of both parents.

The Employee’s Dependent Child ceases to be eligible for the benefit under this policy when that child no longer qualifies as a “dependent child” for tax purposes.

(2) Verification of Eligibility of Spouse/ Dependent Child:

By June 30 of each year following the tax year in which the benefit was received by any Employee for the enrollment of a Spouse/ Dependent Child at ULM, the Employee shall verify the Spouse’s and/ or Dependent Child’s status (as applicable) as claimed on the tuition reduction benefit application(s) submitted in that applicable tax year. The Employee shall provide to ULM’s Office of Human Resources a copy of the Employee’s signed tax return, as filed with the Internal Revenue Service, for each tax year in which the benefit was received under this Policy.

The Employee must provide such documentation for each and every year in which the benefit was received. Documentation provided for a given tax year does not create “evergreen” eligibility status for subsequent years.

(3) Reimbursement to ULM in Case of Subsequent Ineligibility

If by June 30 the Employee for any reason fails to or cannot provide the required tax records or, upon review by the

¹ The Working Families Tax Relief Act of 2004 revised the Internal Revenue Code Section 152 by changing the determination of “dependent child” in multiple ways, including adding new definitions of “qualifying child” and “qualifying relative.” In accordance with the UL System’s PPM FB.IV.V.O-1a, this Policy also incorporates by reference the Internal Revenue Code’s definition of “dependent child.”

Office of Human Resources, the Employee's tax return as filed does not confirm the Employee's attestation of Spouse/ Dependent Child status for the tax year in which the benefit was received, then the Employee retroactively shall be deemed ineligible for the benefit conferred for the Spouse and/ or Dependent Child.

In such cases of subsequent ineligibility, the Employee shall be required to reimburse ULM for the full cost of regular tuition and fees for each semester of enrollment at ULM of the Spouse and/ or Dependent Child during that tax year in which the benefit was received, less any tuition and fee amounts already paid at the reduced rate under the benefit.

VIII. Additional Requirements for Continued Eligibility for the Enrollment at ULM under the Benefit

Account balances must be paid in full each semester. Employees, Spouses or Dependent Children whose accounts are not paid each semester will not be eligible for the benefit for future enrollment. Upon payment of all outstanding balances, the benefit will be reinstated for the subsequent semester, subject to the Employee, Spouse or Dependent Child satisfying all other eligibility requirements as set forth in this Policy.

As permitted under the discretion established in the UL System policy, ULM has put in place the following additional eligibility requirements. Failure to meet any one the following requirements may result in ineligibility for the benefit for a period of up to twelve (12) months.

(1). Minimum cumulative GPA

Employees

To maintain eligibility for the tuition reduction benefit, an Employee must maintain a minimum cumulative GPA as follows:

Undergraduate coursework: 2.5

Graduate coursework: 3.0

Spouses and Dependent Children

To maintain eligibility for the tuition reduction benefit, a Spouse/ Dependent Child must maintain a minimum cumulative GPA of 2.5 in undergraduate coursework.

Failure to Maintain Minimum cumulative GPA

If the enrolled Employee/ Spouse/ Dependent Child fails to maintain the applicable minimum cumulative GPA, he/ she will be placed on "Warning" status but will be allowed to receive the benefit for a subsequent semester. An Employee/ Spouse/ Dependent Child who fails to meet the minimum cumulative GPA requirements by the end of the "Warning" semester will be placed on "Suspension" status. An Employee/ Spouse/ Dependent Child on suspension is no longer eligible for the benefit of the tuition and fee reduction.

It is in the Employee's best interest to monitor this eligibility factor for the Employee/ Spouse and/ or Dependent Child to assure continued eligibility.

Appeal of Suspension Status

An Employee/ Spouse/ Dependent Child may appeal Suspension status in writing with a full explanation of extenuating circumstances and any supporting documentation to the Office of Human Resources. The Director of Human Resources will confer with the President of ULM to determine whether to grant the Employee/ Spouse/ Dependent Child's appeal. If the appeal is granted, the Employee/ Spouse/ Dependent Child will be reinstated to receive the benefit.

(2) Attendance and Resignation/ Withdrawal

To maintain eligibility for the tuition reduction benefit, an enrolled Employee/Spouse/Dependent Child receiving the tuition reduction must adhere to ULM's Class Attendance Regulations/ Excused Absences policy, as found in the ULM Student Policy Manual.

If an Employee/Spouse/Dependent Child must resign from a course or from ULM altogether, then the Employee/Spouse/Dependent Child should 1) consult the ULM Schedule of Classes each semester for dates and times to drop classes and 2) follow the proper withdrawal/resignation procedure. Merely discontinuing class attendance is not considered to be a formal resignation from a class or the University.

Employees/ Spouses/ Dependents receiving the tuition reduction benefit must abide by the official university policies regarding withdrawal from ULM. Withdrawal from one or all courses at ULM, whether voluntary or at the request of the university, does not exempt the Employee/ Spouse/ Dependent from payment in full for charges incurred under the benefit while attending ULM.

Employees using the tuition waiver who do not complete all course work for which they have registered, (dropping a class) in a semester will be placed on a "warning status" but will be allowed to receive the benefit for the subsequent semester. An employee who does not complete all coursework by the end of the "warning semester" will be placed on "suspension" status and will be ineligible for the tuition waiver for the next semester.

(3) Maximum Number of Credit Hours Earned at ULM

An Employee/ Spouse/ Dependent Child pursuing undergraduate coursework at ULM may apply the tuition benefit to up to 140 undergraduate earned credit hours. A ULM Employee may apply the tuition benefit to up to 36 graduate earned credit hours (or required # of hours for a degree program). These limits on earned credit hours under the benefit apply whether or not the Employee/ Spouse/ Dependent Child has completed a degree program.

Once the Employee/Spouse/ Dependent Child has reached the applicable cap on accumulated earned credit hours under the tuition reduction benefit, the Employee/Spouse/ Dependent Child shall be charged full tuition and fees for any credit hours of enrollment subsequent to having reached the applicable 140/ 36 (or required # of hours for a degree program) earned credit hour cap. This will result in the tuition reduction being applied to the hours below the 140/36 cap, but not to the course hours above the cap in which the Employee/Spouse/Dependent Child is enrolled for that given semester.

IX. Timely Tuition/ Fees Payment to ULM

It is the Employee who applies for and is granted the tuition reduction benefit, whether for the Employee's own enrollment at ULM or for the enrollment of Employee's Spouse and/or Dependent Child at ULM, who shall be

responsible for timely payment in full of all tuition costs and fees by the fee deadline each semester.

Failure by the Employee to pay the reduced tuition account in full by the deadline will result in:

1. Employee's ineligibility to apply for the benefit at ULM in future until the outstanding tuition/ fee balance is paid in full to ULM; and
2. Employee being subject to the same ULM billing policies and procedures as are students for any amounts past due.

Upon payment of all outstanding balances, the Employee's eligibility for the benefit will be reinstated for the subsequent semester.

X. Employee Course Enrollment and Workday Schedule

Maximum Course Load for Eligible Employees Under the Benefit

As stated above, eligible active Employees who enroll in courses at ULM or any other UL System institution may apply the tuition reduction benefit to the cost of enrollment in up to six (6) undergraduate credit hours per semester, inclusive of credit hours earned for courses during sessions that occur within the semester, including but not limited to Winter Session, Maymester, and 1st and 2nd eight (8) week terms within any given semester.

However, active ULM Employees seeking to register for credit hours during any of these shorter sessions should note that the class meetings are longer in length due to the short duration of the sessions' terms. As a result, depending on the length of the course sessions, it may not be feasible for an active Employee to enroll in a session course during the workday. In particular, eligible ULM Employees seeking to enroll in courses are subject to the workday scheduling restrictions set forth in "Revised Work Schedule for Eligible Active ULM Employees," immediately below.

Revised Work Schedule for Eligible Active ULM Employees

(1) Each semester, eligible active ULM Employees (both classified and unclassified) are permitted to schedule one (1) course (not to exceed three (3) clock hours per week) during their regular work hours, including break times, with the approval of the appropriate supervisor. However, if an active ULM Employee schedules a course during regular work hours, that Employee must make up the work time missed in one of two ways:

- (i) by revising his/her work schedule or
- (ii) by using annual leave time or compensatory time.

Under the Revised Work Schedule option, the ULM Employee:

- (i) may only use only 30 minutes of a 60-minute meal break to make up work time lost for attending a course;
- (ii) must have meal breaks of at least 30 minutes;
- (iii) must submit to Human Resources a revised work schedule, as approved and signed by the appropriate supervisor(s); and

(iv) must submit a new, supervisor-approved revised work schedule to Human Resources if the ULM Employee's course schedule changes after the initial application is submitted.

Under the option to take accrued annual leave, an active ULM Employee must first complete and have signed for approval by the appropriate supervisor a "Request for Leave" form documenting the accrued annual leave time that the ULM Employee plans to take to make up for the regular work time lost in order to complete the 1 course permitted to be taken during regular work hours per semester. Then each month the ULM Employee shall record on the ULM Employee's monthly leave report the annual leave taken per the approved "Request for Leave." Lastly, the Employee shall timely submit both the "Request for Leave" and the monthly leave report to Payroll.

Using Annual Leave or Comp Time vs. revised work schedule:

Employees can use annual leave, comp time, or a revised work schedule as approved by their supervisor and Vice President. (Note: this means that employees must choose only one option and not a combination of options.) A written authorization of the flexible work schedule must be provided by the supervisor and approved by Human Resources.

No scheduling restrictions are placed on active ULM Employees attending courses outside of their normal work hours.

Employees taking eULM courses will not be allowed to take leave from their daily work schedule, and are prohibited from accessing coursework during regular work hours.

XI. Application and Approvals to Receive the Tuition Reduction Benefit **Application Required for Each Semester**

All Employees seeking the benefit for themselves or for a Spouse/Dependent Child to enroll at ULM should complete ULM's application form. To be considered for the benefit, the Employee must submit an application prior to the start of each semester for which the tuition reduction is sought. The tuition reduction benefit does not automatically carry over from semester to semester.

Those Employee applications and Spouse/ Dependent Child applications may be found on the web page for ULM's Office of Human Resources.

Additionally, for those ULM Employees seeking to enroll in a course that meets during the Employee's regular work day, the Employee must provide to Human Resources a supervisor-approved revised work schedule and/ or supervisor-approved Request for Leave forms, as indicated above. (Note: eULM courses are not eligible for leave during the normal work day.)

Approvals

Non-ULM Employees seeking to apply the benefit (whether for themselves/ Spouse and/ or Dependent Child) must receive the joint approval of the President of ULM, as the host institution, and the approval of the President of the Employee's own institution of employment.

In the case of UL System Office Employees, they must receive the joint approval from both ULM's President and the System President.

XII. Exceptions

Exceptions to this Policy may be granted at ULM’s discretion. Such requests, including a full justification of the request, should be submitted in writing to the Office of Human Resources for initial review and possible forwarding to the President of ULM:

ULM Office of Human Resources
University of Louisiana at Monroe
Coenen Hall 107
Monroe, LA 71209-2300

FAX: (318) 342-5144

Any exceptions to the provisions of PPM FB.IV.V.O-1a should be submitted in writing with a full justification to the System President who shall determine if such an exception will be made.

XIII. Qualified Tuition Reduction

These tuition reductions are considered Qualified Tuition Reductions for purposes of Internal Revenue Service Publication 970.

Authority: UL System PPM FB.IV.V.O-1a

Amendments:

This policy may be amended in writing by the president or the president's designee at any time.

Adopted:

Authorizing Agent’s Signature

Date

Nick J. Bruno, Ph.D.
Name

President
Title