Employee Tuition and Fee Policy

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Policy Type:	University
Responsible Executive:	VP Business Affairs
Responsible Office:	Human Resources
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I. Policy Statement

The University of Louisiana Monroe's (ULM) Employee Tuition and Fee Policy ("Policy") provides specific information regarding 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 ULM as a host institution.

II. Purpose of Policy

The University of Louisiana Monroe's (ULM) Employee Tuition and Fee Policy operates under the 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.

ULM's 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 ULM as host institution.

III. Applicability

This policy applies to all eligible ULM Employees, their Spouses and Dependent Children as well as all eligible UL System Employees, their Spouses and Dependent Children who would like to enroll at ULM and use the benefit.

IV. Definitions

University of Louisiana System: A public University system in the state of Louisiana composed of nine institutions: Grambling State University, Louisiana Tech University, McNeese State University, Nicholls State University, Northwestern State University, Southeastern State University, University of Louisiana Lafayette, University of Louisiana Monroe and University of New Orleans.

V. Policy Procedure

I. Applicability:

The benefit applies to courses taken in the traditional classroom setting as well as on-line courses. Employees, Spouses and Dependent Children are eligible to use the tuition waiver for courses in ULM Online degree plans. All Employees, Spouses and Dependent Children must be pursuing a degree.

Undergraduate Degree Program

ULM extends the benefit as set forth below to eligible Employees, Spouses, and/or Dependent Children to obtain one undergraduate degree. 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.

Graduate Degree Program (Master's Level)

Under the Policy, an eligible ULM Employee may apply the benefit to graduate coursework within a Master's level degree program to obtain a Master's degree from ULM. The benefit can be applied up to 6 credit hours per semester as indicated below.

This 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.

Graduate Degree Program (Doctoral Level)

Under the Policy, an eligible ULM Employee may apply the benefit to graduate coursework within a Doctoral level degree program to obtain a doctoral degree from ULM. The benefit can be applied up to 6 credit hours per semester as indicated below.

This benefit for pursuit of a Doctoral 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.

A. **Continuation of Employment Requirement:** Any ULM employee receiving a tuition waiver for Doctoral work at ULM will be required to sign an employment continuation agreement prior to receiving the benefit.

II. Not Covered under the Benefit

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

- Programs associated with Academic Partnerships (students enrolled in Academic Partnership programs prior to December 1, 2018 will maintain the same tuition waiver benefit.)

The University reserves the right to adjust programs under this section at any time.

III. 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), and the 1st and 2nd eight (8) week terms within any given semester. Employees make take a total of 6 credit hours for the entire summer term using the benefit. Summer Term includes courses taken for the whole summer term or those taken in either Summer I or Summer II sessions. 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.

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 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 and the 1st and 2nd eight (8) week terms within any given semester. Employees make take a total of 6 credit hours for the entire summer term using the benefit. Summer Term includes courses taken for the whole summer term or those taken in either Summer I or Summer II sessions.

Graduate Degree Programs

Eligible Employees pursuing a Master's degree or Doctoral 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), and the 1st and 2nd eight (8) week terms within any given semester. Employees make take a total of 6 credit hours for the entire summer term using the benefit. Summer Term includes courses taken for the whole summer term or those taken in either Summer I or Summer II sessions. If the 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.

IV. 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.

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, Professional Fees and University 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.

Spouses and Dependents shall be assessed the following fees: Academic Excellence Fee, Operational Fee, Technology Fee, Energy Surcharge Fee, and University Facilities Fee and any and all student-assessed fees. Current ULM fee information is found on ULM's Student Account Services webpage: https://www.ulm.edu/controller/sas_billing.html.

V. 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 or more years of service in the UL System. Retired Employees include those qualifying for disability retirement under the Louisiana State Employee's Retirement System or the Teachers' Retirement System of Louisiana.

(3) 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.

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

(1) Verification of Eligibility of Spouse:

Employee must provide a copy of the marriage license between the employee and spouse or a tax return in order to verify eligibility of benefit.

(2) Verification of Eligibility of Dependent Child

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.

[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."

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.

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

Account balances must be paid in full each semester, or a payment plan must be arranged with student account services and be in good standing. Employees, Spouses or Dependent Children whose accounts are not in good standing 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.

(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: 2.0
Graduate coursework: 3.0 or as required by degree plan

Spouses and Dependent Children

To maintain eligibility for the tuition reduction benefit, a Spouse/ Dependent Child must continue to maintain a minimum cumulative GPA of 2.0 in undergraduate coursework.

VIII. 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 and the 1st and 2nd eight (8) week terms within any given semester. Employees make take a total of 6 credit hours for the entire summer term using the benefit. Summer Term includes courses taken for the whole summer term or those taken in either Summer I or Summer II sessions.

However, active 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

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 pay period the ULM Employee shall record on the ULM Employee's 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 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 ULM Online courses will not be allowed to take leave from their daily work schedule and are prohibited from accessing coursework during regular work hours.

IX. 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 each semester.

The employee or dependent tuition waiver application and any additional required information is to be submitted prior to each semester's registration deadlines to the Department of Human Resources. The waiver application will be reviewed by the Department of Human Resources and approved or denied based on the eligibility requirements described below. The Department of Human Resources will send written notification to each applicant indicating that the tuition waiver application has been approved or denied.

Those Employee applications and Spouse/ Dependent Child applications may be found on the web page for ULM's Department 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: ULM Online 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.

X. Requests for Exceptions

Employees submitting a tuition waiver application that was denied may submit a request for an exception in writing with a full explanation of extenuating circumstances and any supporting documentation to the Department of Human Resources. The Director of Human Resources will present the request for an exception to the Tuition Waiver Exceptions Committee for consideration and to determine if the request for an exception will be approved. The Department of Human Resources will send written notification to the employee regarding the outcome of the request for an exception. If the request for an exception is approved, the Employee/Spouse/ Dependent Child will receive the benefit.

The following are examples of situations that an employee may choose to submit a request for an exception:

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.

Employees getting CEU's or certifications required in their field may request an exception.

An employee who already has an undergraduate or Master's degree from ULM using the benefit may request an exception to pursue a second undergraduate or Master's degree that can be directly related to current job responsibilities.

The request for exception should be submitted to:

ULM Department 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.

XI. 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

VI. Enforcement

The Department of Human Resources is responsible for enforcing this policy.

VII. Policy Management

The Vice President for Business Affairs is the Responsible Executive for the management of this policy. The Director of Human Resources is the Responsible Officer for this policy and the Department of Human Resources is the Responsible Office which implements and administers this policy.

VIII. Exclusions

N/A

IX. Effective Date

This policy is effective on November 2, 2021.

X. Adoption

This policy is hereby adopted on this 2nd day of November 2021.

Recommended for Approval by:

Dr. Bill Graves, VP for Business Affairs

Approved by:

Dr. Ronald Berry, President

XI. Appendices, References and Related Materials

University of Louisiana System Policy Number: FB IV.V.O-1a Employee Tuition and Fee Policy
https://s25260.pcdn.co/wp-content/uploads/2017/11/3-FB-IV-V-O-1a-Employee-Tuition-and-Fee-Policy-Revised-as-of-2-20-15.pdf

XII. Revision History

Revision History

Original Adoption Date: July 6, 2016

Revised December 10, 2018: Revisions include placing the policy in the new format, changes to the III. Not Covered under the Benefit Section to exclude Academic Partnership Programs and include a right to adjust programs in this section, changes to IV. Tuition Reduction and Fees Waived section regarding Spouses and Dependent Children tuition charges per credit hour.

Revisions also included changes to the VII. Determination of Eligibility of Spouse/ Dependent Child for Benefit section and clarification regarding reimbursement to the university in the Attendance and Resignation/ Withdrawal section**.** The name of ULM's online degree program - eULM was updated to reflect the new name of ULM Online. Updates were also made in the Graduate Degree Program Section.

Revised February 17, 2020: Revisions include removing a part of Section IV. Tuition Reduction and Fees Waived pertaining to spouse and dependent tuition charges per credit hour. The X. Application and Approvals to Receive the Tuition Reduction Benefit section was revised to include the process of applying for the tuition waiver and how Human Resources would communicate with the applicant. The XI. Appeals and Exceptions section was revised to include information about the appeal process for previously denied applications.

Revised August 19, 2021: The policy went through major revisions in almost every section.

Revised November 2, 2021: The policy was modified in the request for exception section.