

## Section 5.7 - Tuition Waiver

(Approved by the Executive Council, 6/1/16)

### I. Purpose

The primary purpose of the Tuition Waiver Policy is to set forth the conditions and terms under which current employees, spouses and dependents of current employees, certain relatives of the Sisters of Charity of the Incarnate Word, and others may receive assistance toward tuition costs at the University of the Incarnate Word.

Related purposes include delineation of eligibility for tuition waiver at Incarnate Word High School, St. Anthony Catholic High School, other Brainpower Connection schools, and various Colleges/Universities who are participating members of tuition exchanges in which UIW is also a participating member.

### II. University of the Incarnate Word

#### General

- A. Any otherwise eligible individual must also meet the admission requirements of UIW in order to utilize the tuition waiver benefit.
- B. All costs other than academic tuition (e.g. fees, books, room and board, etc.) will be considered the financial responsibility of the student and are not covered under the tuition waiver benefit. Likewise, any tuition costs designated for technology-related purposes are not covered under the tuition waiver benefit.

Any individual utilizing the tuition waiver benefit must demonstrate Satisfactory Academic Progress (SAP) by maintaining a 2.0 GPA on all undergraduate courses and a 3.0 GPA on all graduate courses taken at UIW. In addition, individuals must complete 75% of the coursework they attempt. Any student not maintaining SAP forfeits all future rights to the tuition waiver benefit. At the end of each Spring semester (or Spring 2 for Extended Studies programs) the Office of Financial Assistance will review the academic progress of each individual and contact individuals that are not maintaining SAP. A complete electronic version of the SAP policy is available on-line [http://www.uiw.edu/finaid/documents/1516\\_sap\\_policy.pdf](http://www.uiw.edu/finaid/documents/1516_sap_policy.pdf)

- C. All individuals will be required to meet SAP standards, beginning 06/01/2011. Any coursework taken from that date forward will be included in the SAP review. Please refer to the Office of Financial Assistance Employee/Dependent Waiver Information Form for additional details.
- D. The Tuition Waiver Application must be completed and submitted to the Office of Human Resources *for each semester, session, and/or term* before tuition remission will be granted. Waivers must be submitted no later than fourteen calendar days after the last day to add a course for the term. Failure to complete and submit the application in a timely manner will result in denial of the waiver request.
- E. The tuition waiver benefit will not be used for courses in which the instructor is compensated on a per capita basis (except for online courses). Such courses include (but are not limited to) voice, music, ballet, or other individual instruction. Tuition waiver covering the banded tuition rate will be reduced by the tuition charge for the number of hours of individual instruction.
- F. The tuition waiver benefit may be used to audit courses free of charge provided the instructor offering the course approves the audit. All other eligibility factors applicable to the status of the student as outlined in this document must be satisfied.

### III. Employee Eligibility

Any individual who is employed at UIW on a regular, full-time employment agreement (for at least 75% of the time) as a faculty member, administrator, or staff member may receive a full tuition waiver for themselves for undergraduate and/or graduate classes with the following stipulations:

- A. Only three credit hours or less per regular semester, and three credit hours or less during the summer, are eligible for tuition waiver for a maximum of nine credit hours per academic year. Any courses/credit hours taken over the allowable amount will be considered the financial responsibility of the employee.
- B. A maximum of twelve undergraduate or nine graduate credit hours per academic year beginning with the first full term of the fiscal year (Summer I and ending with Term VI- Spring 2) are eligible for tuition waiver through the Adult Degree Completion Program. However, no more than three credit hours may be taken during any single term utilizing the tuition waiver benefit. Any courses/credit hours taken over the allowable amount will be considered the financial responsibility of the employee.

With the concurrence of the dean and supervisor, the Director of Human Resources may approve a maximum tuition waiver for 6 hours (or 2 3-hour courses) in one term.

- C. A maximum of fifteen credit hours for undergraduate or a maximum of nine credit hours for graduate classes per academic year are eligible for partial tuition waiver through online courses. The waiver will cover the per credit hour charge. Employees are responsible for the direct cost of instruction of \$350.00 per class. This amount is subject to change in future years. However, no more than three credit hours may be taken during any single term utilizing the tuition waiver benefit. Any courses/credit hours taken over the allowable amount will be considered the financial responsibility of the employee. With the concurrence of the dean and supervisor, the Director of Human Resources may approve a maximum tuition waiver for 6 hours (or 2 3-hour courses) of Online courses in a single term.
- D. Employee eligibility must be attained before the first day of classes for the specific semester/session/term for which the waiver of tuition is sought. Employees hired on a regular, full-time basis or converting to a full-time after the first day of classes must wait until the following semester/session/term to utilize this benefit.
- E. Eligible employees who are administrators or staff may not take courses during their normal working hours. Under no circumstances will the regular work schedule be reduced for the purpose of taking a college course. The Tuition Waiver benefit does not apply to doctoral courses.
- F. Graduate tuition waivers which exceed \$5,250 per calendar year are subject to federal income tax withholding. Taxable fringe benefits are defined in IRS Publication 15B and the Internal Revenue Code §127. Therefore, graduate tuition waivers in excess of \$5,250 will be added as taxable compensation on the last December paycheck each year, and federal income tax withholding will be deducted according to the withholding election on the employee's latest Form W-4. As a result, this amount will be included in the taxable income reported on the Form W-2.

### IV. Spouse/Dependent Eligibility

#### A. Faculty/Staff/Administrative Employees

Individuals employed at UIW on a regular, full-time employment agreement (for at least 75% of the time) as faculty/staff/administrative employees may receive full tuition waivers for current legal spouses and/or legal dependents for undergraduate courses taken at UIW with the following stipulations:

1. Spouses/dependents of regular, full-time employees are eligible for the tuition waiver benefit according to the following scale:

- Less than one year of full-time employment      0% of cost
- One year or more of full-time employment      100% of cost

Additionally, the sponsoring employee must be in a regular, full-time work status for the length of time specified above, before the first day of classes for the semester/session/term for which the tuition waiver benefit is sought. Employees whose service anniversary date falls after the first day of classes for a particular semester/session/term, will not be eligible for the higher benefit percentage for spouses and/or dependents until the following term. Likewise, a spouse must have become the legal spouse of an otherwise eligible staff employee before the first day of classes for which a waiver is being sought. UIW reserves the right to request a copy of the marriage license or certificate of common-law marriage to confirm eligibility status.

2. Tuition waiver is limited to a maximum of 18 credit hours during the full fall semester, 18 credit hours during the full spring semester, and 12 credit hours during all summer sessions combined. Credit hours over the designated maximum are the financial responsibility of the individual and/or qualifying employee. Courses taken through ADCaP and the Virtual University are eligible for spouse/dependent waiver providing that all other criteria for acceptance into that program are met.
3. The tuition benefit can only be applied to tuition charges for the lesser of 144 attempted credit hours or one baccalaureate degree.
4. In order for a dependent child to be eligible for the tuition waiver benefit, he/she must be the biological or legally adopted child of the employee. A stepchild of an otherwise eligible employee may utilize the waiver benefit provided his/her primary residence is the same as that of the employee. A child for whom the employee has legal guardianship and custody for a minimum of three years may utilize the waiver benefit provided appropriate court documents are presented for total or partial support in anticipation of adoption. In all of the above instances, the dependent child must have been claimed as a legal exemption of the sponsoring employee on the most recent federal income tax return of that employee, or be classified as a dependent student of the employee as defined in the 'Free Application for Federal Student Aid' (FAFSA) for the current school year.
5. Any child of an otherwise eligible faculty/administrator employee who is 25 years of age or older on or before the day classes begin for a particular semester/session/term is no longer eligible for the tuition waiver benefit under any circumstances. If a legally dependent child turns 25 after the first day of a semester/session/term for which tuition waiver has been granted, that child may receive the benefit for the remainder of that semester/session/term.
6. The tuition waiver benefit for spouses/dependents does not apply to graduate courses and graduate professional programs.
7. Some study abroad programs may be eligible for the tuition waiver benefit. If a student is studying at a straight exchange sister school, meaning UIW does not pay tuition to that sister school, then the tuition waiver does apply. Students are responsible for additional expenses such as fees, room, board, and transportation. A current list of straight exchange sister schools is available in the Study Abroad Office of International Affairs.

8. Faculty and Administrative employees hired prior to June 1, 2016 are grandfathered under the prior Tuition Waiver Policy until their one year anniversary date or June 1, 2017, whichever date comes first.

**V. Sisters of Charity of the Incarnate Word**

1. All Sisters of Charity of the Incarnate Word employed on a regular, full-time basis at UIW or on a leave of absence from UIW are eligible to receive a 100% tuition waiver for undergraduate courses for parents, brothers, sisters, nieces and nephews.

**VI. Required Financial Assistance Procedures**

1. All individuals utilizing the tuition waiver benefit for six or more credit hours per semester/session/term must, in addition to the regular Tuition Waiver Application, complete all other necessary forms as required by the Financial Assistance Office.
2. The tuition waiver benefit in combination with any other grants and/or scholarships may never exceed the direct cost of attendance. The waiver benefit may be reduced by the amount of grants/scholarship funds received by the student, provided all other direct costs have been covered. Work Study wages and loans are not included in the waiver limitation.
3. The waiver benefit applies to tuition only. Students that live on campus may combine the waiver and an academic scholarship to help cover the costs of room (not board) and tuition. The waiver does not cover fees, books, food plans, or laptop charges.
4. Students who qualify for the Federal Pell grant and/or funded outside scholarships may use up to \$1000 per semester of those funds toward the costs which are not covered by the waiver program, up to their demonstrated need. Federal Pell and/or funded outside scholarships may be used to pay for course fees, books, food plan, or laptop.

**For Example:**

	On Campus Example 1	Off Campus Example 2	Off Campus Example 3
Tuition	\$10,200	\$10,200	\$10,200
Room	\$ 3,240		
Total	\$13,440	\$10,200	\$10,200
UIW Academic Scholarships	(\$3,200)	(\$ 500)	(\$2,500)
Federal Pell Outside Scholarships			\$ 350

Remaining Balance	\$10,240	\$ 9,700	\$ 7,700
Allowable Waiver Limit	\$10,200	\$ 9,700	\$ 7,700

The above calculation of the tuition waiver limit may result in an amount exceeding the cost of tuition; the tuition waiver, however, may not exceed the cost of tuition.

## VII. Other College Tuition Exchange Programs

UIW participates in certain other tuition exchange programs which allow qualified employees and/or their legal spouses/dependents to receive tuition waiver benefits. These benefits are subject to the stipulations and specified limitations of the institution from which the tuition waiver is being requested. For more specific information, please contact the Office of Human Resources. UIW is currently a member of the following organizations offering this benefit to some degree:

1. Catholic College Cooperative Tuition Exchange (CCC) (currently consisting of 70 colleges/universities nationally).
2. Council of Independent Colleges (CIC) (currently consisting of 423 private colleges/universities nationally).
3. The Tuition Exchange (TE) (currently consisting of 625 colleges/universities nationally).

### Definitions and Details

1. **ELIGIBLE EMPLOYEE:** Any currently employed full-time UIW employee who has completed two years of continuous full-time service as of September 1 of the current academic year on the same basis as the UIW Tuition Waiver.
2. **DEPENDENT:** See UIW Employee Handbook, Section 5.7, IV, A. & B., 3 & 4.
3. **APPLICANT:** The dependent of an eligible employee who has applied for full-time admission to a college or university that participates in the Tuition Exchange (TE) program. Scholarships are not granted for graduate study, non-degree study, or second undergraduate degrees.
4. **DEADLINE:** By November 1 of each academic year dependents of eligible employees who are seeking TE will notify the Office of Human Resources in writing of their intention to apply.
5. **DETERMINATION:** By December 1 of each academic year, the Office of Human Resources will be in a position to determine how many new students can be certified.
6. **EQUITY:** If the number of applicants is equal to the number of TE scholarships available, each applicant will be given the opportunity to apply for a TE scholarship.
7. **TIEBREAKERS:** If the number of applicants exceeds the number of TE scholarships, candidates will be selected using the following priority ranking:
  - a. First priority will be given to applicants based on the employment seniority of the eligible employee. Seniority is based on years of continuous full-time service at UIW.

- b. Among applicants whose parents have the same years of seniority, priority will be determined by financial need as measured by the FAFSA.
- c. Last priority will be given to students with family members who have already received a TE scholarship.

### **VIII. High School Waivers**

Tuition waivers are available for dependent children of otherwise qualified employees to attend Incarnate Word High School and St. Anthony Catholic High School. The High School waiver benefit covers 75% of tuition only. Fees, books, uniforms, etc. are the financial responsibility of the employee. Once a waiver is approved (and in order to provide uninterrupted academic progression for the child), the employee need not reapply for the benefit each year, provided he/she maintains his/her full-time employment status with UIW. High school waivers are not applicable to any summer school sessions. Employees of either high school are eligible to receive full tuition waivers for their dependent children. The children of these employees may attend either high school.

In order for a dependent child to be eligible for the tuition waiver benefit, he/she must be the biological or legally adopted child of the employee. A stepchild of an otherwise eligible employee may utilize the waiver benefit provided his/her primary residence is the same as that of the employee. A child for whom the employee has legal guardianship and custody for a minimum of three years may utilize the waiver benefit provided appropriate court documents are presented for total or partial support in anticipation of adoption. In all of the above instances, the dependent child must have been claimed as a legal exemption of the sponsoring employee on the most recent federal income tax return of that employee.

### **IX. Senior Connection Waiver Assistance**

Through the UIW Senior Connection Program, gifted students enrolled at participating high schools are able to achieve fifteen college credit hours simultaneously with the completion of their high school diploma requirements. Although each student selected for the Senior Connection Program currently receives a 50% tuition discount, tuition costs are not completely covered. If a dependent child of an otherwise eligible employee is selected for the Senior Connection Program, he/she will be eligible for a tuition waiver according to applicable guidelines contained in Parts III, IV, and V of this document.

### **X. Brainpower Connection**

UIW participates in certain reciprocal tuition waiver benefits with other Brainpower Connection schools (St. Peter, Prince of Apostles Elementary School and St. Anthony Elementary School). The principals of these elementary schools determine the availability of slots for dependent children of UIW as follows:

1. Full-time employees of UIW are eligible for a 50% tuition waiver for their eligible dependent children at St. Anthony Elementary School and St. Peter, Prince of Apostles Elementary School, with a number limitation of 1 per 50 students enrolled. These waivers apply for those dependents in kindergarten through 8th grade at St. Peter's Elementary and 3K through 8th grade at St. Anthony Elementary.
2. These guidelines pertaining to tuition benefits with other Brainpower Connection schools may not be honored in cases where a specific class enrollment is already so high that the additional child would require the school to hire an aide under TEA rules, or where the inclusion of an additional student would increase a specific class enrollment beyond limits previously established by school boards or TEA.
3. Applications must be made in a timely fashion. Prior to open enrollment dates, schools guarantee the slots in (1) above. It is the responsibility of the applicant to determine open enrollment dates of

specific schools. Entrance criteria established by each school will apply.

4. No more than one reduced tuition per family will be allowed unless the quota offered has not been reached.
5. Fees, books and uniforms are not included in the reductions and are the financial responsibility of the individual.
6. When applications exceed the number of available slots, job seniority of parent sponsor or employee applicant will be used in reaching a decision.
7. Tuition waiver and enrollment remain in effect as long as the student is in good standing and the parent or employee remains employed on a full-time basis by a Brainpower school. The reduction will remain in effect through the semester in which the parent was employed in order to protect the educational integrity of the student's program and to avoid a hardship on that student.
8. Teachers at St. Peter's and St. Anthony Elementary pursuing teacher certification are eligible to receive tuition waivers at UIW for a maximum of two classes per semester.