TAP NO. 13: ACADEMIC BENEFITS - TUITION REMISSION

INTRODUCTION

The University offers academic benefits in the form of tuition remission to all eligible (hereafter defined) employees, their spouses and dependent children. Tuition remission under this policy refers to a waiver or a reduction of tuition at the basic tuition level adopted by the University and does not include differential tuition levels required by some schools, nor does it include fees or required textbooks. Employees accepting tuition remission benefits under this policy will be responsible for paying all tuition differentials, textbooks and fees associated with their particular academic pursuits.

It is the intent of the University to provide tuition remission benefits, for each eligible employee and family member as outlined below.

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<th>Employee’s full-time employment start date is prior to July 1, 2010:</th>
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<tr>
<td><strong>FIRST DEGREE</strong></td>
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<td>Full-time Faculty and Staff:</td>
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<td>Faculty Eligible Dependents:</td>
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<td>Staff Eligible Dependents:</td>
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| **SECOND DEGREE**                                           |
| Full-time Faculty, Staff and Eligible Dependents:            | 40% basic tuition remission |

<table>
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| **SECOND DEGREE**                                             |
| Full-time Faculty and Staff:                                  | 40% basic tuition remission |
| Faculty and Staff Eligible Dependents:                        | Not Eligible |
OVERVIEW

The following provisions will apply to the tuition remission benefit regardless of hire date:

A. For all full-time, non-temporary employees, eligibility for tuition remission begins the first semester coinciding with or following the hire date. All employees are limited to nine (9) credits per term at basic tuition credit rates. Employees enrolled in the Saturday College may enroll for 12 credits per semester under the two terms per semester schedule in the fall and spring.

B. All part-time faculty, part-time nursing staff of the Health Services Department, part-time head coaches and part-time assistant coaching staffs are eligible for a one-half basic tuition remission for studies pursued at Duquesne University while the employee is actively employed.

C. Part-time head coaches and part-time assistant coaches are those coaching intercollegiate sports who have the primary responsibility for coaching a team(s) or activity for one or more complete seasons of intercollegiate competition and who are paid by the University.

D. In the event of an approved and documented disability, including Worker’s Compensation, retirement defined as age 62 with ten years of continuous full-time employment, or death of full-time employee, prior to enrollment of their spouse or eligible dependent children, tuition remission will be granted based on years of full-time service as outlined below. Time spent on Worker’s Compensation does not count towards years of service.

- Five but less than six years of service, 25%.
- Six but less than seven years of service, 40%.
- Seven but less than eight years of service, 55%.
- Eight but less than nine years of service, 70%.
- Nine but less than ten years of service, 85%.
- Ten or more years of service, 100%.

E. Duquesne University retirees who have not exhausted their basic tuition remission benefits are eligible for this program which includes one degree at 100% basic tuition remission and a second degree at 40% basic tuition remission.

F. All members of the Holy Spirit Community are eligible for full, basic tuition remission.

G. Spiritans assigned to the University are eligible for full tuition remission at the University for up to two (2) nieces or nephews. A seventy-five percent (75%) basic tuition remission for a third niece or nephew, and fifty percent (50%) basic tuition remission to all others. A 40% basic tuition remission will apply to courses taken for the second degree under this benefit at the University.

H. Congregation of the Holy Spirit, United States Province, not assigned to the University are eligible for a fifty (50%) basic tuition remission at the University for nieces and nephews.

REQUIREMENTS AND DEFINITIONS

A. All applicants for tuition remission must first qualify for and meet admission requirements of the University.

B. Tuition remission forms (available on line from Financial Aid Office) must be completed, appropriate signatures obtained and returned to the Benefits Office by the deadline dates on the form. Generally, the deadlines are established as one week prior to the start of classes each semester.

C. Forms received after the established deadline will be subject to a reduction in the tuition remission benefit for the applicable semester. The Financial Aid Office will process a per occurrence reduction in the benefit of 5% or a maximum fee of $1,000, whichever is less.

D. The following family members qualify as eligible dependents. Employees are responsible for providing accurate and timely dependent eligibility documentation. Any employee concealing, deceiving, or misrepresenting information will be subject to disciplinary action up to and including termination of benefits, termination of employment and/or prosecution. Any tuition remission benefits paid for ineligible dependents will require restitution.

1. Your legal spouse as defined by the Commonwealth of Pennsylvania.

2. Your unmarried, dependent children who are under the age of 19 and dependent on you for support and maintenance and are claimed as an exemption on your federal income tax return. The following children qualify as eligible dependents:

   a. Employee’s natural children.
   b. Stepchildren who live with you.
   c. Legally adopted children.
   d. A child placed with you for adoption.

   e. Due to the expiration of legal guardianship at the age of 18, the University will permit the previously documented legal guardianship to be used as proof of eligibility for Tuition Remission purposes. The employee must be able to document legal guardianship for five continuous, consecutive years prior to the child turning 18 (i.e., between the ages of 13 to 18) to be considered eligible for the Tuition Remission. The child must continue to be claimed on the employee’s income tax while...
utilizing the Tuition Remission. Special consideration may be provided if an unusual circumstance resulted in a break in the guardianship between the ages of 13 to 18 if he employee can prove the guardianship was entered into for a minimum of ten years. Documentation will be required before the remission can be approved.

3. Your unmarried, dependent children ages 19 through 25 if they are full-time students (as determined by the school) attending an accredited college, university, technical trade, or mechanical school provided the student is dependent on you for support and maintenance, live with you or away at school and are claimed as an exemption on your federal income tax return.

E. Eligible employees and their eligible family members are entitled to earn one four-year undergraduate degree (or its equivalent) or one graduate degree using the basic tuition remission policy based upon their hire date.

F. Eligible employees and their eligible family members (if hired prior to July 1, 2010) are entitled to earn a second degree under this program at 40% of the basic tuition remission level based upon their hire date.

G. Tuition remission refers to a waiver of the basic tuition cost. All other fees, books, room and board, basic tuition differential, equipment, etc., are the responsibility of the recipient. Costs not covered will be invoiced through Student Accounts via a paperless system on a semester basis. All invoices must be paid in full before registration is permitted.

H. Each Tuition Remission Form indicates the valid fall, spring, summer semesters. The employee is responsible for completion of a new form upon expiration.

GENERAL PROVISIONS

A. Credit bearing courses taken under programs granting Certificates will be subject to the level of tuition remission associated with the degree that is being pursued at the time.

B. Tuition remission is available for credit bearing courses taken at Duquesne University.

C. Tuition remission is available for credit bearing courses at the Duquesne University Italian campus.

D. Tuition remission does not apply to courses taken outside the University and outside the Tuition Exchange Program.

E. Employees who wish to attend school during normal working hours must obtain prior approval from their immediate supervisor and the respective Department Head. Approval may not be granted if the request places an unreasonable burden upon department employees. If approved, the employee is responsible for making up missed hours during the same work week, or to charge vacation time, at the supervisor’s discretion because the employee cannot be paid for time not worked. No class assignments may be performed during working hours.

F. Requests for tuition benefits submitted by newly employed personnel and/or their eligible family members will be applied to the semester coinciding with or immediately following their employment. For employees under a partial tuition remission benefit, once the benefit has been established, it will remain in effect for the duration of the semester, regardless of the employee’s anniversary date.

G. The Financial Aid Office recommends that all undergraduate students apply for State and Federal Grants. Assistance in completion of these grants is available from the Financial Aid Office.

H. This benefit is intended for retirees (defined above), active employees, and their eligible family members. Employees separating from employment for reasons other than a layoff/reduction in force or loss of position funding will not be eligible for tuition remission for themselves or their eligible family members. The employee will be invoiced for payment based upon the Federal Pro-Rata Refund Policy administered via the Financial Aid office. Employees who are subject to layoff/reduction in force or loss of funding will be able to complete the semester currently enrolled and not subject to making repayment.

I. In no case will additional academic benefits be granted when both parents of an eligible dependent child are employed by the University. Also, if an employee is covered by more than one provision of this policy, only the provision that applies to their primary University status will be used to provide these benefits. Example: a graduate student receiving a tuition waiver, will not be eligible to receive tuition remission under this policy if they also teach a course, nor could a part-time nurse receiving one-half tuition remission under this policy also receive the duplicate benefit if teaching on a part-time faculty status.

J. This benefit is intended to provide tuition remission benefits only to the extent required to cover the direct costs of tuition, fees and University provided room and board for undergraduate students; tuition and fees for graduate students. Tuition remission recipients shall not receive University controlled gift aid, such as need-based grants, endowed funds, scholarships, etc., greater than the amount required for their direct costs.
K. Eligible dependent children must be enrolled for the degree(s) they may be pursuing before attaining age 24. Tuition Remission continues until the end of the semester in which the student turns 25.

L. If Federal Tax Laws qualify tuition remission as compensation, the University will be mandated to add the value of the tuition for the employee, their spouse and/or their dependent(s) to regular salary and withhold appropriate taxes. Employees are responsible for reviewing current tax laws to determine their financial responsibility and how it may affect their gross income.

M. A separate Graduate Tuition Remission Plan exists for employees, which is intended to qualify as an educational assistance plan pursuant to Section 127 of the Internal Revenue Code. This plan provides, at the present time, a taxable educational assistance benefit for graduate level courses for employees.

N. A 50% room and board allocation will be awarded to dependent children of full-time faculty, administrators, professionals and support staff who achieve exceptionally high secondary school academic records. Graduating seniors who achieve SAT scores of 1200 or higher who range in the top 2% of their class may be eligible upon recommendation by the Admissions Office. Awards will be issued through the Financial Aid Office and will require a 3.5 grade average to be maintained.

O. The University offers an Audit – Professional Development program for full-time employees. This training and professional development opportunity permits class enrollment with no fees. The Audit – Professional Development form, available from the Office of Human Resource Management, must be completed, appropriate supervisor and Vice President approvals obtained, and returned to the Benefits Office by the deadline dates on the form. Generally, the deadlines are established one week prior to the start of classes each semester. Enrollment for the class is completed via the School of Leadership. Participation may be limited. Employees will not receive grades or credits associated with classes completed using this program. Books that may be purchased by the department will remain the property of the University at the conclusion of the class.

P. The University also offers tuition exchange programs through Tuition Exchange (TE) and the Council of Independent Colleges (CIC). This list of participating institutions is available on line at www.tuitionexchange.org, www.cic.org/tep and through the Financial Aid Office. To participate in this program, the following procedures apply:

1. All applications must be filed with the Financial Aid Office by December 1st of the year preceding enrollment.

2. The applications are reviewed in the following order of eligibility: Eligible renewal candidates; Full-time undergraduates who are: Dependent children of full time employees, Spouses of full-time employees, Full-time employees, Full-time graduates – only if importing school allows in same order as above.

3. If the quota system of the exchange program prohibits approval of all applicants, selection will be made based on the employee’s length of full-time service with the University.

4. Final decision will be issued to students by late December of the year preceding enrollment.

5. The Financial Aid Office must receive signed acceptance notification by April 1 for the award to be valid.

6. Only one family member at a time may participate in the program.

7. Students are responsible for meeting admission requirements and being accepted as tuition exchange students by the host institution.

8. Applications that could not be approved due to the quota system will be placed on a waiting list for processing should spaces become available.

9. Applications that could not be processed due to being received after the deadline will be placed on a waiting list for processing should spaces become available. These forms will be processed in order of receipt if spaces become available.

10. This benefit is available for first-degree earned only and will count as the first-degree earned.

Duquesne University reserves the right, at its sole discretion, to amend this plan in whole or in part at any time and from time to time or to terminate it at any time without advance notice. It is also understood that these benefits are intended to comply with all existing Federal or State Benefit and/or Tax Regulations. Amendments to the plan are made by the Office of Human Resource Management with the approval of the Vice President for Management and Business. Termination of the plan must be proposed by the Vice President and approved by the Executive Committee of the University Board of Directors.

REV: 10/2012