

## **GUIDELINES FOR ADMINISTERING DEPENDENT TUITION WAIVER POLICY**

A. **PURPOSE:** The purpose of these guidelines is to assure consistent implementation of Regent Policy 940.32, Tuition Waivers for Dependents.

B. **ELIGIBILITY:**

1. All employees who have been employed at  $\frac{3}{4}$  time or more for at least five years without a break in service are eligible for a dependent tuition waiver benefit.
  - a. Temporary service at  $\frac{3}{4}$  time or more in a temporary position counts toward the 5-year waiting period as long as there is no break in service. Employment during an entire academic year is considered one year of service and there is no break in service as long as the employee is reemployed for the subsequent academic year.
  - b. No part-time employment at less than  $\frac{3}{4}$  time counts toward meeting the 5-year qualifying period. However, any time employed at  $\frac{3}{4}$  time or greater will count, even when it is preceded by or followed by less than  $\frac{3}{4}$  time employment as long as there is no intervening break in service. Employees must be employed  $\frac{3}{4}$  time or greater for the entire academic term to maintain their eligibility to use the dependent tuition waiver.
  - c. Authorized time in an official layoff status or on an approved leave without pay does not count toward the 5-year qualifying period but does not constitute a break in service.
  - d. Sabbaticals and other forms of paid leave are considered time worked for purposes of meeting the 5-year qualifying period.
  - e. Employees who have prior service with a unit of the university system and are later reemployed after more than a 5-day break in service must serve the entire 5-year waiting period to be eligible for the dependent tuition waiver benefit.
  - f. All time worked at the Office of Commissioner of Higher Education or at any unit of the university system at  $\frac{3}{4}$  time or more shall count toward the 5-year qualifying period as long as there is no break in service when the employee accepts a new position at a different unit of the university system. Employment at any private institution, at any tribal college or the community colleges in Kalispell, Glendive and Miles City does not count towards meeting the 5-year qualifying period.
  - g. Employees must have met all of the aforementioned eligibility requirements prior to (or as of) the first day of the academic term in order to be eligible for the dependent tuition waiver benefit.
2. An employee must remain employed the entire academic term during which the tuition waiver is utilized. If an employee terminates his/her employment prior to the end of the academic term, the employee shall be required to repay the cost of the dependent tuition waiver.
3. Jointly employed spouses are each eligible for a dependent tuition waiver benefit, however in no case may the benefit be pooled. Eligible jointly employed spouses may utilize the dependent tuition waiver benefit for two children at one time but any one child may not receive more than a 50% tuition waiver under the dependent tuition waiver policy.

C. **APPLICATION/CERTIFICATION PROCESS**

1. Applications for the dependent tuition waiver benefit are to be initiated by the employee or the employee's dependent. Applications require approvals/ signatures of the employee, the dependent utilizing the tuition waiver and the Human Resources Office. The campus Human Resources Office is responsible for certifying employee

eligibility for the dependent tuition waiver benefit. Human Resources will send a copy of the eligibility certificate to the appropriate financial aid office.

2. New certification and recertification is required for each academic term.
3. Reasonable deadlines for submitting an application for a dependent tuition waiver may be established by each campus unit. Employees who do not submit a timely application for a dependent tuition waiver may be denied the dependent tuition waiver benefit.
4. Employees will be required to sign a statement verifying 1) that they are not utilizing the tuition waiver for themselves; and 2) the child utilizing the tuition waiver is claimed as a dependent for federal tax purposes, is unmarried and has not reached age 25 as of the first day of the semester for which the tuition waiver is granted; or 3) the employee is married to the spouse utilizing the tuition waiver. Documentation that a dependent has been claimed in the tax year the benefit is used may be required for audit purposes or in cases of suspected misuse. False certification of dependent eligibility for the tuition waiver is cause for discharge and the employee shall be required to repay the cost of the tuition waiver.

#### D. EDUCATION BENEFIT

1. The dependent tuition waiver benefit is a 50% reduction in the cost of residential tuition. This benefit is not taxable. In no case may registration, course fees or any other mandatory fee be waived.
2. Dependents may utilize the dependent tuition waiver at any unit of the university system for which they have applied and been accepted as long as eligibility standards are maintained. Students who are dually enrolled at more than one unit receive a 50% reduction in the cost of residential tuition for courses taken at each unit.
3. There is no limitation on the number of credits that may be taken per semester under the tuition waiver benefit.
4. If the employer requires an employee to take a course at a university unit in order to obtain new job skills and the employee wants to utilize the dependent tuition waiver for a spouse or child, the employer is responsible for paying the full tuition for the employee, thereby preserving the option of the employee to allow their child or spouse to access the dependent tuition waiver benefit.
5. The dependent tuition waiver benefit may be used for on-line, electronic courses as long as they are for credit and are not self-supporting. The dependent tuition waiver does not apply to noncredit, continuing education, or other self-supporting courses. The dependent tuition waiver benefit may not be used to attend law school or obtain a graduate degree. Graduate level courses are excluded from the dependent tuition waiver benefit. Dependents may utilize the tuition waiver benefit to obtain only their first baccalaureate degree.
6. Students who receive other tuition waivers or scholarships awarded by the university need to disclose their eligibility for the dependent tuition waiver benefit and are only eligible to receive both benefits, or portions thereof, at the discretion of the university. Such students shall receive, at a minimum, the greater of the two benefits. Scholarships awarded by outside entities are not subject to this limitation.

# Montana University System Dependent Partial Tuition Waiver Application

*This application is solely to determine eligibility for the Dependent Partial Tuition Waiver. It does not register you with the University nor does it enroll you in classes.*

**DEPENDENT STUDENTS AND EMPLOYEES MUST BOTH COMPLETE THE FOLLOWING AND SIGN AND DATE IN THE SPACES PROVIDED. EMPLOYEES MUST COMPLETE THIS FORM AND RETURN IT TO THEIR CAMPUS HUMAN RESOURCES/PERSONNEL OFFICE WITHIN THE DEADLINES ESTABLISHED BY EACH CAMPUS.**

DEPENDENT/SPOUSE		EMPLOYEE	
Name:		Name:	
Student ID #:		Banner ID #:	
Relationship to Employee:		Employing Dept.:	
Applying for Session/Semester: (Summer/Fall/Spring/Yr)		Are you currently using a Faculty/ Staff Fee Waiver?	
Will you be combining this Dependent Partial Tuition Fee Waiver with any other university fee waiver or scholarship?		Employing Montana University System Campus	
Please list all campuses where you may utilize this fee waiver:			

- Employees must have completed 5 years of employment at ¾ time or more without a break in service as of the first day of the academic term in order to be eligible for the dependent tuition waiver benefit.
- Employees who utilize the faculty and staff tuition waiver are not eligible for a dependent partial tuition waiver during the same academic term.
- For each qualifying employee, only one dependent may utilize a dependent partial tuition waiver in an academic term.
- An eligible dependent includes the **employee's spouse and any child who is claimed as a dependent for federal tax purposes during the calendar year that includes the first day of the semester for which the tuition waiver is utilized who is unmarried and under the age of 25.** Documentation that a dependent has been claimed in the tax year the benefit is used may be required to determine eligibility, for audit purposes or in cases of suspected misuse.

By signing below we certify we meet all the eligibility guidelines set forth above. Misrepresentation of eligibility by employee or student may be cause for the employee's discharge and any tuition waiver received may be withheld from the employee's salary or charged to the student's account. The value of the tuition waiver may also be withheld from the employee's paychecks or charged to the student's account if the employee terminates employment or has their FTE reduced to below ¾ time during the academic term.

\_\_\_\_\_  
*Employee's Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Student's Signature*

\_\_\_\_\_  
*Date*

<b>Official Use Only:</b>	<b>Human Resources/ Personnel:</b>	<hr/> <b>Signature</b>	<hr/> <b>Printed Name</b>	<hr/> <b>Telephone</b>	<hr/> <b>Date</b>
	<b>Financial Aid:</b>	<hr/> <b>Signature</b>	<hr/> <b>Printed Name</b>	<hr/> <b>Telephone</b>	<hr/> <b>Date</b>

