

# SE Benefits Eligible Employee Tuition Scholarship Waiver Form

## PROGRAM PROCEDURES

### Tuition Scholarship Waiver:

As a benefit to regular full-time employees, the tuition waiver program is designed to assist employees and their dependents to expand their education through courses at Southeastern Oklahoma State University (SE). Consistent with OSRHE policy, in-state employees/dependent's tuition will be waived. For out-of-state employees/dependents, cash will be applied to tuition.

### Eligibility:

An employee who is granted full-time employment status with benefits by August 1 for the Fall semester, January 1 for the Spring semester, and May 1 for the Summer semester is eligible for the employee tuition waiver effective that semester. The waiver can be transferred to eligible dependents (includes spouses that are not full-time employees of the University). Eligibility of a dependent is based on the IRS-approved guidelines to determine dependent status. For general purposes, "dependent" means an individual over half of whose support, for the calendar year in which the taxable year of the taxpayer begins, was received from the taxpayer. You must be allowed by the IRS to legally claim the "dependent" in the taxable year. *If you did not claim the dependent in the taxable year, then you must provide the reason why on the tuition waiver form.*

### Benefits:

The tuition waiver covers only tuition (in accordance with OSRHE policy), not fees, books or any taxes. In compliance with current IRS tax law, the University paid portion of IRS-defined graduate level courses/fees may be considered taxable income. The waiver is based on a maximum dollar amount instead of credit hours. Every eligible employee is allocated \$5,000 per year, with a limit of \$2500 per semester. If an employee has not depleted the waiver allocation for the fall and the spring semesters, then up to \$2500 of the balance can be applied to summer courses (for example: \$1666.67 Fall semester, \$1666.67 Spring semester, \$1666.66 Summer semester). No recipient of this benefit can exceed \$5,000 per year.

### Application Deadline:

In order to receive the tuition waiver, the eligible employee must 1) complete a "SE Benefits Eligible Employee Tuition Scholarship Form" with the supervisor's signature, and 2) submit to the Financial Aid Office for final approval by August 1 for the Fall semester, January 1 for the Spring semester, and May 1 for the Summer semester. *The employee's most recent 1040 Income Tax form MUST BE ATTACHED to the tuition waiver form.*

Employees interested in enrolling in courses at Southeastern are subject to the same admission requirements, course availability, and registration processes as other students.

### Financial Aid Coordination:

The waiver program will be integrated with any other financial aid received from or through SE. Multiple awards may be granted, but in no case shall waivers generate a cash refund or credit to be applied to other charges or fees. Total aid cannot exceed estimated cost of attendance. The Financial Aid Office may require further documentation.

Tuition assistance is not waived for workshops, correspondence courses or institutes. An employee allowing classes to conflict with job performance may be barred from this benefit. If an individual terminates employment, the tuition waiver benefit will cease at the end of the semester in which employment ended.

### Guidelines and Limitations:

The University places no limitations on the number of hours of course work in which an employee may enroll outside of the employee's normal working hours. However, such course work cannot interfere with the employee's duties as determined by the supervisor. A regular full-time employee may adjust his/her work schedule with approval from the supervisor to accommodate no more than four (4) credit hours of course work during the employee's normal work shift. Time lost taking courses during the normal work shift shall be made up, and at a time mutually acceptable to both the employee and the supervisor. Makeup of lost time must be completed during each forty-hour work week. Make up times are to be consistent and equal to the time away from work, thereby providing a routine work pattern. Any use of annual leave or compensatory time for make-up time must be approved by the immediate supervisor. Employees should understand that online classes may only be taken after the regular workday. A class scheduled during the lunch hour will not count as the one authorized course offering during the employee's normal work shift. It is important to note that any such arrangements must be approved by the supervisor, who is not obligated to give such approval. Review and approval by the appropriate Vice President in the administrative channel and the Vice President for Business Affairs is required prior to enrollment for any course work that proposes more than this policy allows during the normal work shift.

