

<p><b>Name of Policy:</b> Tuition waiver</p> <p><b>Policy Number:</b> 3364-25-35</p> <p><b>Approving Officer:</b> President</p> <p><b>Responsible Agent:</b> Executive Vice President for Finance and Administration and CFO</p> <p><b>Scope:</b> All campuses of the University of Toledo</p>		 <p><b>Effective date:</b> August 14, 2023</p> <p><b>Original effective date:</b> June 16, 2010</p>	
<p><b>Keywords:</b> Tuition, waiver, spouse, dependents, reciprocity</p>			
	New policy	X	Minor/technical revision of existing policy
	Major revision of existing policy		Reaffirmation of existing policy

(A) Policy statement

The university of Toledo is committed to providing a total compensation package that includes a tuition waiver benefit for eligible employees.

(B) Purpose of policy

To set forth the eligibility criteria and procedures for the tuition waiver program at the University of Toledo for the fall, spring, and summer semesters.

(C) Scope

Employees, spouses, and dependents must be academically qualified to be eligible for the waiver as determined by their admission to the university of Toledo through the office of enrollment management. Tuition benefits for employees, spouses and dependents are solely a tuition waiver of

university of Toledo and do not cover any additional fees or costs associated with instruction unless otherwise precluded by collective bargaining agreements.

- (1) All main campus and health science campus benefit eligible full-time and regular part-time (minimum 0.5 FTE) employees are eligible for tuition waiver effective the first semester following date of hire and following successful completion of the probationary period. The human resources department will verify employee eligibility.
  - (a) Employees are eligible for a maximum of eight credit hours of tuition per semester.
    - (i) Full-time employees are eligible for 100% tuition waiver for undergraduate courses. Employees are responsible to pay the general fees, tech fees, lab fees, and any other fees that the university may charge. For graduate courses, the tuition waiver will cover the program per credit hour tuition rate, not to exceed the non-specialized graduate tuition per credit hour rate.
    - (ii) Part-time employees are eligible for a pro-rated tuition waiver according to their FTE status for undergraduate courses. For graduate courses, the tuition waiver will cover the pro-rated program per credit hour tuition rate, not to exceed the non-specialized graduate tuition per credit hour rate according to FTE status.
    - (iii) Courses in the doctor of medicine program at the college of medicine are excluded from coverage, as are any students enrolled as medical students.
    - (iv) The waiver cannot be applied to coursework used for the juris doctorate program at the college of law unless precluded by collective bargaining agreements. Employees who matriculated into the juris doctorate program at the college of law prior to June 30, 2020, are eligible to continue to use the tuition waiver for college of law coursework until they complete the program if they have been continuously enrolled and

continuously employed by the university since their pre-June 30, 2020 college of law matriculation.

- (b) The tuition waiver request form must be submitted by the last day to add a class listed by semester on the office of the registrar's web page..
  - (c) The tuition waiver will only pay for each course once, including courses that are retaken due to a withdrawal, unless the withdrawal is due to an extenuating circumstance as defined in the university's administrative adjustment for extenuating circumstances policy 3364-71-16. The only exception is courses that are designed to be repeated for credit.
- (2) Spouses of benefit eligible full-time and part-time (minimum 0.5 FTE) employees are eligible for tuition waiver for undergraduate courses subject to the following:
- (a) Spousal eligibility will be verified through a marriage certificate.
  - (b) All employees must complete one calendar year of service with the university prior to the first day of the academic term to which the benefit applies before the spouse is eligible for coverage under this policy.
  - (c) The human resources department will verify spousal eligibility.
  - (d) Spouses are eligible for a maximum of one hundred fifty undergraduate credit hours of waived tuition.
  - (e) The tuition waiver request form must be submitted by the last day to add a class listed by semester on the office of the registrar's web page.

- (f) The tuition waiver will only pay for each course once including courses that are retaken due to a withdrawal unless the withdrawal is due to an extenuating circumstance as defined in the university's administrative adjustment for extenuating circumstances policy 3364-71-16. The only exception is courses that are designed to be repeated for credit.
  - (g) Coursework is subject to annual verification of satisfactory academic progress where satisfactory academic progress is defined by the university's academic standing policy 3364-71-01.
- (3) Dependent children of benefit eligible full-time and part-time (minimum 0.5 FTE) employees are eligible for tuition waiver for undergraduate courses subject to the following:
- (a) Dependent children are defined as:
    - (i) Natural children, stepchildren or adopted children of the eligible employee;
    - (ii) Younger than twenty four years old as of the end of the calendar year, or any age if permanently and totally disabled at any time during the year;
    - (iii) Unmarried; and
    - (iv) Claimed as an IRS tax dependent on the eligible employee's income taxes.
  - (b) All employees must complete one calendar year of service with the university prior to the first day of the academic term to which the benefit applies before dependent children are eligible for coverage under this policy.
  - (c) The human resources department will verify dependent eligibility.
  - (d) Dependent children are eligible for a maximum of one

hundred fifty undergraduate credit hours of waived tuition.

- (e) The tuition waiver request form must be submitted prior to the deadline to add a class listed by semester on the office of the registrar's web page.
  - (f) The tuition waiver will only pay for each course once including courses that are retaken due to a withdrawal unless the withdrawal is due to an extenuating circumstance as defined in the university's administrative adjustment for extenuating circumstances policy 3364-71-16. The only exception is courses that are designed to be repeated for credit.
  - (g) Coursework is subject to annual verification of satisfactory academic progress where satisfactory academic progress is defined by the university's academic standing policy 3364-71-01.
- (4) For employees who have completed a minimum of five years of service at the university and who retire from the university through a state retirement system or the alternative retirement program, the employee's eligible dependents will be entitled to use the tuition waiver benefit until the last day of the academic term in which the fifth anniversary of employee's retirement occurs unless precluded by collective bargaining agreements. Eligible dependents who matriculated in a degree-seeking program at the university of Toledo prior to June 30, 2020, are eligible to continue to use the tuition waiver until they complete the program as long as they are continuously enrolled.
- (5) If an eligible employee dies and, at the time of the event he or she had completed at least five years of service, the tuition waiver benefit will apply as follows: the employee's surviving spouse (so long as he or she has not remarried) and eligible dependents who have used this benefit once during the ten-year period following the date of the employee's death will be entitled to continue to use the

benefit until they graduate or are no longer eligible for the benefit unless precluded by collective bargaining agreements.

- (6) For changes in employment status other than retirement or death during a semester in which a fee waiver is in effect for the employee, spouse or dependent, the employee will be eligible to receive the benefit only for the remainder of the term in which the change in employment status occurs unless precluded by collective bargaining agreements.
- (7) Reciprocity with Bowling Green state university
  - (a) The reciprocity program is available only for employees. Spouses and dependent children are not eligible to participate.
  - (b) Reciprocity is available only for programs of study not offered at the university of Toledo.
  - (c) Courses of study must be degree-seeking and taken for credit.
  - (d) Courses and programs in the university of Toledo's college of law and college of medicine and life sciences are not included in the reciprocity agreement.
  - (e) Eligible employees must follow Bowling Green state university rules and regulations regarding use of Bowling Green state university waiver which is available from Bowling Green state university human resources - <https://www.bgsu.edu/human-resources/benefits/tuition-fee-waivers.html>.
  - (f) This benefit is available only for as long as both the university of Toledo and Bowling Green state university agree to maintain the reciprocity agreement between the two institutions.

(D) Procedure

(1) Scheduling courses for employees

- (a) Scheduled courses and related course work should not interfere with the performance and completion of job duties and responsibilities of faculty, staff, and employees. The individual's supervisor determines any effect on job performance.
- (b) Classified civil service employees may not take courses during regularly scheduled working hours. In the event the job requires the courses, and the courses are work-related, or if the courses are required for a degree and are not offered at another time, the employee may be permitted to take the courses during regularly scheduled working hours. The employee will be required to make up the work time. The employee may not utilize break times to make up this time. The employee may make up the time before or after regular work hours or on Saturdays. Any arrangements for unpaid leave will result in a temporary reduction in pay. The employee's immediate supervisor must approve arrangements for any courses taken during regularly scheduled working hours and the employee must notify the human resources department in writing.
- (c) Unclassified staff may take courses during working hours provided the individual's immediate supervisor and vice president approve in advance, in writing.
- (d) Immediate supervisors and vice presidents should exercise reasonable efforts to provide a flexible work schedule in situations in which courses must be taken during regularly scheduled work hours.

(2) Waiver Applications

- (a) Courses of study taken by spouses and dependents must be degree-seeking through the university of Toledo and taken for credit. Spouses and dependents enrolled as “guest students” will not be eligible for the tuition waiver benefit. Spouses and dependents enrolled full time at an institution other than the university of Toledo will not be eligible for the tuition waiver benefit.
- (b) The tuition waiver benefit cannot be used for enrollment in non-credit courses or credit courses which are audited.
- (c) Eligible students must apply for admission to The University of Toledo through the admissions office and register for courses through the university’s registration process prior to a tuition waiver request being submitted.
- (d) Tuition waiver applications must be completed online in the “MyUT” portal by the employee. Eligible retired employees should contact human resources for a copy of the tuition waiver form to be completed for their dependent.
- (e) Tuition waiver requests must be submitted each semester for each eligible student. The tuition waiver request form must be submitted prior to the add/drop deadline posted by the office of the treasurer. Retroactive tuition waiver applications will not be processed.
- (f) Payment of all fees not covered by the waiver are the student’s obligation. Human resources will not be responsible for the removal of late fees on the student’s account prior to the waiver submission.
- (g) Tuition waiver applies to the first enrollment of a course except for courses that are intended to be repeated for credit and withdrawals that are made for extenuating

circumstances as defined in the university's Administrative adjustment for extenuating circumstances policy 3364-71-16. The class participant will be charged the full tuition if they wish to retake a course for which a grade was previously issued, or withdrawn after the add/drop date.

- (h) The tuition waiver can only be applied to university of Toledo tuition assessment for the fall, spring, and summer semesters.
  - (i) Except for the reciprocity agreement with Bowling Green state university, the tuition waiver can be applied to university of Toledo only.
- (3) The provost and human resources are authorized to create additional employee waiver benefits to support instruction in strategically identified academic programs. The terms of those waivers will be specified by the provost and implemented by human resources.

<p><b>Approved by:</b></p> <p><i>/s/</i></p> <hr/> <p>Gregory Postel, MD President</p> <p><b>Date:</b> August 14, 2023</p> <p><b>Review/revision completed by:</b></p> <ul style="list-style-type: none"> <li>• <i>Chief Human Resources Officer</i></li> <li>• <i>Senior Leadership Team</i></li> </ul>	<p><b>Policies superseded by this policy:</b></p> <ul style="list-style-type: none"> <li>• <i>V-7-7 Personnel: payment of fees - 2/10/1999</i></li> </ul> <p><b>Original effective date:</b> <i>June 16, 2010</i></p> <p><b>Review/revision date:</b> <i>April 2, 2013</i> <i>September 2017</i> <i>April 2019</i> <i>December 20, 2019</i> <i>August 14, 2023</i></p> <p><b>Next review date:</b> <i>August 14, 2026</i></p>
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