



UT System Administration Policy Library -- Policy INT149

## Tuition Assistance

Responsible Officer: Associate Vice Chancellor for Employee Benefits and Services

Sponsoring Office: Office of Employee Services

Effective Date: November 1, 2006

Last Reviewed: July 2, 2009

Next Scheduled Review: July 1, 2012

Errors or changes to: [policyoffice@utsystem.edu](mailto:policyoffice@utsystem.edu)

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## **POLICY STATEMENT**

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UT System recognizes that programs for the education of its employees can materially aid in the effective performance of their job duties. Any tuition assistance agreement must have as its primary objective the furtherance of the interests and missions of UT System.

The tuition assistance program (“Program”) permits eligible employees to enroll in college or university coursework that directly relates to the employee’s job duties and can reasonably be expected to enhance the employee’s performance of those job duties.

The Program provides benefits only for coursework specific to the employee’s current job duties, and does not cover additional coursework that may be needed for a degree program.

Compliance with this program is the responsibility of the participating employee and his/her chain of management.

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## **RATIONALE**

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The purpose of this policy is to provide tuition assistance for employees of The University of Texas System (UT System) that complies with Board of Regents’ *Rules and Regulations*, Rule 30112.

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## **SCOPE**

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All offices of UT System Administration

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## **WEBSITE ADDRESS FOR THIS POLICY**

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<http://www.utsystem.edu/policy/policies/int149.html>

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## RELATED STATUTES, POLICIES, REQUIREMENTS OR STANDARDS

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UT System Administration Policies & Standards	Other Statutes, Policies & Standards
<ul style="list-style-type: none"><li>• <a href="#">Board of Regents' Rules and Regulations, Rule 30112</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Texas Government Code Chapter 656 Subchapters C (State Employees Training Act) &amp; D</a></li></ul>

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## CONTACTS

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If you have any questions about UT System Administration Policy INT 149, *Tuition Assistance*, contact the following offices:

Subject	Office Name	Telephone Number	Email/URL
Human Resources Employee Benefits	Office of Employee Services	512-499-4587	<a href="mailto:esc@utsystem.edu">esc@utsystem.edu</a>

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## DEFINITIONS

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**See complete FAQ in the Appendix of this Policy.**

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# RESPONSIBILITIES

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## Employee

- Maintains active non-probationary status, has received at least a satisfactory rating on the most recent performance evaluation, and signs an agreement to remain employed by the UT System for at least one full month for each semester hour of tuition assistance reimbursed.
- Reviews and completes an Application for Tuition Assistance Benefits Form; forwards the form through the chain of management to the applicable Vice Chancellor and to the Office of Employee Services (OES).
- Completes the Tuition Assistance Program Agreement and a Request for Payment of Business Expense form, attaches original receipts for payment of tuition and proof of successful completion of course work; forwards the reimbursement packet to OES within 30 calendar days after the completion of the course work.

## OES

- Notifies the employee and supervisor by email that the application packet conforms to Program guidelines.
- Reviews submitted materials, including a cover memo affirming that the request for reimbursement is in accordance with Program guidelines, and forwards the completed Request for Payment of Business Expense form and materials to APS.

## APS

- Processes the request for reimbursement in accordance with applicable APS procedures; notifies OES by email of the date and amount of reimbursement to the employee.

## Employee's Department

- Responsible for the funds used for this program.

## Chain of Management

- Approves participation by the employee through the applicable vice chancellor.

## Supervisor

- Verifies that the employee's participation in the course work can be expected to enhance the performance of the employee's job duties, and furthers the interests of UT System and/or the institution.

- Verifies that the employee’s participation will not disrupt the operations of the employing department, and that the department has sufficient funds to cover the expected costs to be reimbursed.

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## **PROCEDURES**

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### **1. Basic Program Requirements**

#### **1.1 Covered Fees and Limitations**

The program provides for reimbursement of tuition and related fees (e.g., building use fee, technology fee, student services, health and insurance fees for students in health-related studies, registration fee), following successful completion of graduate or undergraduate course work by an eligible employee at an accredited institution of higher education, subject to a maximum of \$2000 per fiscal year. Course work includes on-line and telecommuting courses.

Program benefits to a participating employee are limited to two three-hour courses (or the institution's equivalent thereof) in one semester.

Program benefits to a participating employee are limited to a lifetime total of twenty-four semester hours.

Reimbursement for private college or university education costs may not exceed the cost of comparable courses charged by the nearest state-supported four-year institution of higher education.

Non-reimbursable expenses include parking costs, late fees or financing fees, books, travel expenses, or incidental items, including those required by the instructor, e.g., calculator, specific software.

#### **1.2 Eligibility**

Participation in this program is limited to regular full-time employees. An employee in a position that requires student status as a condition of employment is not eligible to participate.

Participation by the employee must be approved by the employee’s chain of management through the applicable vice chancellor.

A participating employee must have the necessary prerequisites for enrollment in the proposed coursework.

Course work must be directly related to the job for which the employee is employed during his or her participation in the program. The participating employee's supervisor must verify that the employee's participation in the course work can be expected to enhance the performance of the employee's job duties and further the interests of UT System and/or the institution. The supervisor must also verify that the employee's participation will not disrupt the operations of the employing department and that the department has sufficient funds to cover the expected costs to be reimbursed.

A participating employee must

- be in and maintain active non-probationary status; and
- have received at least a satisfactory rating on the most recent performance evaluation.

### **1.3 Participating Employee Agreement**

A participating employee must sign an agreement to remain employed by the UT System for at least one full month for each semester hour of tuition assistance reimbursed, beginning with the month after the month in which the employee completed the coursework and to repay the institution for all expenses for which the employee was reimbursed if the employment terminates before the end of that period.

### **1.4 Supervisory Responsibility**

The supervisor must ensure that an employee's participation in the Program will not interfere with the performance of the employee's essential job duties.

## **2. PROCEDURES**

### **2.1 Application**

In order to apply for tuition assistance benefits, an employee must:

- Review the Tuition Assistance Program Agreement. This form must be submitted by the employee once the course work has been completed.
- Complete an application for tuition assistance benefits using the Tuition Assistance Program Application for Benefits.
- Forward the completed Tuition Assistance Program Application for Benefits, with required class material attachments, through the chain of management to the applicable Vice Chancellor;
- Forward the approved Tuition Assistance Program Application for Benefits, with applicable attachments, to OES.

OES will notify the employee by email, with a copy to the supervisor, that the application packet conforms to Program guidelines.

The application packet must be received in OES prior to the beginning of the semester for which the employee is requesting assistance.

## **2.2 Reimbursement**

In order to receive reimbursement, a participating employee must:

- Complete the Tuition Assistance Program Agreement;
- Complete a Request for Payment of Business Expense form in accordance with applicable Accounting and Purchasing Services (APS) procedures;
- Attach original receipts for payment for all tuition, required fees and any other reimbursable program related expenses;
- Attach proof of successful completion of course work with a grade of “C” or better for undergraduate course work, or a “B” or better for graduate course work; and
- Forward the reimbursement packet to OES within 30 calendar days after the completion of the course work.

OES will:

- Review the submitted materials;
- Attach a cover memo affirming that the request for reimbursement is in accordance with Program guidelines; and
- Forward the completed [Request for Payment of Business Expense](#) form and original receipts for payment for all tuition, required fees and any other reimbursable program related expenses to APS.

APS will:

- Process the request for reimbursement in accordance with applicable APS procedures; and
- Notify OES by email of the date and amount of reimbursement to the employee.

The UT System will reimburse a participating employee who separates employment with UT System due to a reduction in force that occurs during a semester prior to completion of the approved course work. To obtain reimbursement in such cases, the separated employee must submit the form, proof of successful completion and the required receipts within 30 calendar days after the completion of the course work. It will be the employee’s responsibility to confirm that UT System has a current address on file for reimbursement purposes.

## **2.3 Repayment**

A participating employee who separates employment with UT System prior to completion of an in-force Tuition Assistance Program Agreement period for any reason other than a reduction in force, permanent disability, or death must repay UT System the

amount previously reimbursed to the employee under the tuition assistance program for the applicable semester(s).

The employee has the option of making a lump sum payment or installation payments in accordance with a schedule to be provided by UT System.

If the employee elects to make installation payments, a default in payment on any installment due will result in the entire unpaid indebtedness, at the option of UT System, becoming due and payable.

The separating employee must complete a Repayment Agreement and bring it to the exit interview in OES.

### **3. Flexible Work Hours**

A participating employee may be allowed flexible work hours in order to accommodate class sessions. Any such work schedule to accommodate class time is subject to supervisory approval and must be reviewed every semester or course period.

The employee must use personal leave for any time off taken for the purpose of attending class or related activity that is not flexed within that work week.

### **4. Funding**

Funds used for this program will be the responsibility of the employee's department and must be budgeted in accordance with UT System's budget process.

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## **FORMS AND TOOLS / ONLINE PROCESSES**

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[Tuition Assistance Program Agreement](#)

[Application for Tuition Assistance Benefits](#)

[Request for Payment of Business Expense](#)

[Tuition Assistance Program Repayment Agreement](#)

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## **APPENDIX**

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### **TUITION ASSISTANCE PROGRAM FREQUENTLY ASKED QUESTIONS**

#### **What is the maximum benefit available?**

\$2000 per fiscal year (September 1 through August 31 of the following year).

Reimbursement for private college or university education costs may not exceed the cost

of comparable courses charged by the nearest state-supported four-year institution of higher education.

**Does UT System pay for course tuition fees up-front, or after completion of the course(s)?**

Reimbursement is made to the employee following satisfactory completion of the course(s).

**Is there a minimum period of employment required before an employee can participate in the program?**

Employees who are still in their probationary period of six months are not eligible for the program. After completion of the probationary period, all employees in good standing are eligible for the program.

**What if the tuition and fees of a single course cost more than \$2000?**

The maximum tuition assistance benefit available to an employee is \$2000 per fiscal year.

**Can a part-time employee participate?**

No. Only regular full-time employees can participate.

**Does this program apply to an employee's family members?**

No. Only regular full-time employees of UT System are eligible to participate.

**Does UT System sponsor degree programs?**

No. The employee applies for reimbursement of tuition and allowable fees on a semester basis.

**How does UT System determine how much benefit an employee gets?**

An eligible employee can be reimbursed for the costs incurred for tuition and allowed fees for one or more courses during a semester to a maximum of \$2000. The employee submits receipts in order to receive reimbursement.

**What if the tuition and fees for a course are less than \$2000, does the employee just receive the \$2000?**

No. The employee is reimbursed for actual tuition and allowable fees, based on receipts provided, to a maximum of \$2000. Reimbursement will not exceed actual costs for tuition and allowable fees.

**Is there a limit to the number of courses that can be taken under the program?**

Yes, program benefits to a participating employee are limited to two three-hour courses (or the institution's equivalent thereof) in one semester and a lifetime total of twenty-four semester hours.

**Does the employee have to attend a UT institution to receive tuition assistance?**

No, the employee can attend any accredited college or university.

**Does the program apply to both undergraduate and graduate level courses?**

Yes.

**Do the courses have to be job-related?**

Yes.

**What if the employee drops or fails a course?**

To receive reimbursement, the employee must receive at least a “C” grade in an undergraduate course and at least a “B” grade in a graduate course.

**What if the employee receives a grade lower than a “C” grade in an undergraduate course or lower than a “B” grade in a graduate course?**

The employee will not be reimbursed for the tuition and fee costs.

**What if the employee drops a course after registering?**

The employee will not be reimbursed for the tuition and fee costs.

**Is there a period of employment required following the employee’s receipt of tuition assistance?**

Yes. The employee must work for UT System for at least one month for each semester hour of tuition assistance received following the reimbursement.

**If an employee leaves UT System employment and is required to repay UT for tuition assistance, does the repayment have to be made at one time?**

No, the repayment can be in a lump sum or in installment payments.

**If the employee just doesn’t pay the amount back after leaving UT System, what will happen?**

UT System will pursue collection through the Courts (Travis County, Texas).

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Keywords: Tuition Assistance Program, training, education, tuition, college, college classes, tuition reimbursement, HR, human resources

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