

**1. Title**

Tuition Assistance

**2. Policy**

Sec. 1 Purpose. The purpose of this policy is to provide tuition assistance for employees of The University of Texas System that complies with Board of Regents' *Rules and Regulations*, Rule 30112.

Sec. 2 Objective. U. T. 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 U. T. System.

Sec. 3 Policy Statement. 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.

Sec. 4 Provisions. 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.

Sec. 5 Compliance. Compliance with this program is the responsibility of the participating employee and his/her chain of management.

Sec. 6 Basic Program Requirements.

6.1 Covered Fees and Limitations.

- (a) 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 coursework by an eligible employee at an accredited institution of higher education, subject to a maximum of \$2,000 per fiscal year. Coursework includes online and telecommuting courses.
- (b) Program benefits to a participating employee are limited to two three-hour courses (or the institution's equivalent thereof) in one semester.
- (c) Program benefits to a participating employee are limited to a lifetime total of 24 semester hours.

- (d) 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.
- (e) Nonreimbursable 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.

6.2 Eligibility.

- (a) 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.
- (b) Prior to beginning coursework, participation by the employee must be approved by the employee's chain of management through the applicable Vice Chancellor.
- (c) A participating employee must have the necessary prerequisites for enrollment in the proposed coursework.
- (d) Coursework 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 coursework can be expected to enhance the performance of the employee's job duties and further the interests of U. T. 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.
- (e) A participating employee must:
  - (i) be in and maintain active nonprobationary status; and
  - (ii) have received at least a satisfactory rating on the most recent performance evaluation.

- 6.3 Participating Employee Agreement. A participating employee must sign an agreement to remain employed by the U. T. 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.
- 6.4 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.

Sec. 7 Applying for and Receiving Reimbursement.

- 7.1 Before Coursework Begins: Application.
  - (a) In order to apply for tuition assistance benefits, an employee must do the following before the beginning of the course(s) for which the employee is requesting assistance:
    - (i) read this policy;
    - (ii) complete an application for tuition assistance benefits using the Tuition Assistance Program Application for Benefits;
    - (iii) forward the completed Tuition Assistance Program Application for Benefits, with required class material attachments, through the chain of management to the applicable Vice Chancellor;
    - (iv) forward the approved Tuition Assistance Program Application for Benefits, with applicable attachments, to the Office of Employee Services (OES). The application packet must be received in OES prior to the beginning of the course(s) for which the employee is/are requesting assistance; and
    - (v) review the terms contained in the Tuition Assistance Program Agreement. This form must be submitted by the employee once the coursework has been completed.

- (b) OES will notify the employee and his/her supervisor if the application meets the Program criteria.

7.2 After Coursework is Completed: Reimbursement.

- (a) After coursework is completed, in order to receive reimbursement, a participating employee must:
  - (i) complete the Tuition Assistance Program Agreement;
  - (ii) complete a Request for Payment of Business Expense form in accordance with applicable Accounting and Purchasing Services (APS) procedures;
  - (iii) attach original receipts for payment for all tuition, required fees, and any other reimbursable program related expenses;
  - (iv) attach proof of successful completion of coursework with a grade of "C" or better for undergraduate coursework, or a "B" or better for graduate coursework; and
  - (v) forward the reimbursement packet to OES within 30 calendar days after the completion of the coursework.
- (b) OES will
  - (i) review the submitted materials;
  - (ii) attach a cover memo affirming that the request for reimbursement is in accordance with Program guidelines; and
  - (iii) forward the completed [Vendor Expense Report Form](#) and original receipts for payment for all tuition, required fees, and any other reimbursable program related expenses to APS.

- (c) APS will:
  - (i) process the request for reimbursement in accordance with applicable APS procedures; and
  - (ii) notify OES by email of the date and amount of reimbursement to the employee.
- (d) The U. T. System will reimburse a participating employee who separates employment with U. T. System due to a reduction in force that occurs during a semester prior to completion of the approved coursework. 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 coursework. It will be the employee's responsibility to confirm that U. T. System has a current address on file for reimbursement purposes.

### 7.3 Repayment.

- (a) A participating employee who separates employment with U. T. 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 U. T. System the amount previously reimbursed to the employee under the tuition assistance program for the applicable semester(s).
- (b) The employee has the option of making a lump sum payment or installation payments in accordance with a schedule to be provided by U. T. System.
- (c) 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 U. T. System, becoming due and payable.
- (d) The separating employee must complete a Repayment Agreement and bring it to the exit interview in OES.

## Sec. 8 Flexible Work Hours.

- 8.1 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.

- 8.2 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.

Sec. 9 Funding. Funds used for this program will be the responsibility of the employee's department and must be budgeted in accordance with U. T. System's budget process.

**3. Definitions**

None

**4. Relevant Federal and State Statutes**

[Texas Government Code, Chapter 656 Subchapters C \(State Employees Training Act\) and D](#)

**5. Relevant System Policies, Procedures, and Forms**

[Board of Regents' Rules and Regulations, Rule 30112](#)

[Tuition Assistance Program Agreement](#)

[Application for Tuition Assistance Benefits](#)

[Vendor Expense Report Form](#)

[Tuition Assistance Program Repayment Agreement](#)

[Tuition Assistance Program Frequently Asked Questions](#)

**6. System Administration Office(s) Responsible for Policy**

Office of Employee Services

**7. Dates Approved or Amended**

November 1, 2006

January 21, 2010

January 26, 2012