

Dependent Tuition Benefits

Employee Eligibility

In order for a dependent child to be eligible to receive tuition remission or exchange benefits, the employee/parent must meet the following requirements:

1. Must be a current full-time employee with a minimum .75 FTE schedule (1,560 hours per year).
2. Must have completed five (5) years of full-time service with Willamette prior to the beginning of the semester for which tuition remission is being requested. Full-time service at other institutions of higher education may be credited against the five- year waiting period. Prior part-time service at Willamette or other institutions will be prorated to credit against the five-year service requirement. Full credit will be given for employees designated as full-time .75 FTE or above.
3. The service requirement must be met prior to the start of the semester for which tuition remission or exchange is being requested, and benefits are based on the employee's continuous employment during the term of the benefit.

Dependent Children Eligibility

1. In order for a dependent child to be eligible to receive tuition remission or exchange benefits, the child must meet the following requirements:
2. He/she must be accepted for enrollment at Willamette or the school to which they are applying for Tuition Exchange. All applicants are subject to the same admission standards/requirements as all students.
3. He or she must be a legally dependent biological, adopted or step-child of the employee. To prove "legal" dependence, the employee must provide a copy of the first page of his/her most recent income tax return (Form 1040) showing that the child was claimed as a dependent.
4. Eligibility continues until the calendar year following the year in which a child reaches the age of 24 years, the use of eight (8) semesters, or the attainment of a baccalaureate degree or its equivalent, whichever comes first.

Retiree or Disabled/Deceased Former Employees

Dependent children of employee-parents who have completed at least five (5) years of full-time (minimum .75 FTE) service and are actively employed in a full-time tuition-eligible position at the time of death or total disability, retain eligibility for tuition remission/exchange benefits. The children must be dependents of the employee at the time of death or disability.

Likewise, dependent children of employee-parents who have reached 59 years of age and have completed at least ten (10) years of full-time (minimum .75 FTE) service retain eligibility for tuition remission/exchange benefits upon the employee's retirement, including provisions described above upon the death of the retired employee. Again, the children must be dependents of the employee at the time of retirement in order to be extended benefits.

Procedures

1. **Apply for Admission** - The dependent child should begin the process of applying for admission to the schools that they are interested in as soon as possible in the year prior to actual enrollment. Admission to the college the student wishes to attend will be determined through the regular admissions process established by that college, without regard to the applicant's potential eligibility for tuition remission. The

student should file an application for admission in the usual way and pay all required fees and deposits for the college he or she wishes to attend.

2. **Complete Tuition Remission Application Form** - The dependent child and employee-parent should complete the Tuition Remission/Exchange Application indicating to which schools he/she will be applying and submit the form to Human Resources by December 1 for first year admissions, and February 1 for renewals. A copy of the employee- parent's most recent 1040 form showing dependent status of the child must be submitted with the application. Timely submission is critical to ensuring your child has the best chance at receiving benefits.
3. **Human Resources Reviews Application** - Human Resources reviews the application for eligibility and approves or rejects application. If rejected, HR will send the rejected application back to the employee with a letter indicating why it has been rejected.
4. **Human Resources Forwards Application for Processing** - HR forwards approved eligibility certifications to the appropriate schools or exchange administrator.
5. **Benefit is Processed** - Upon acceptance to the participating school, Financial Aid applies tuition remission benefits against the student's tuition bill.
6. **Renewal** - Tuition Remission/Exchange does not automatically renew each year! Renewal applications must be submitted every year and should be submitted no later than February 1 of the year proceeding the academic year for which tuition remission/exchange benefits are being requested!

Willamette Tuition Remission

Eligible Dependent children of Willamette University faculty and staff may receive up to eight (8) semesters of 100% tuition remission for full-time undergraduate attendance at Willamette. Both the employee and the child must meet the eligibility criteria identified above. Benefits apply only to tuition costs and not to any course-related expenses such as lab fees, books, and room and board.

Great Lakes Colleges Association (GLCA) Tuition Remission Exchange

Tuition Remission is available for 8 semesters or 12 quarters (four years) of study. Participating students must make satisfactory academic progress, as determined by the college they are attending, in order to retain eligibility for tuition remission. A Student TRE Fee must be paid by the student each year. This fee is 15 percent of the mean charge of tuition for the participating colleges. The participation fee will be billed by the college the student is attending. The charges included in the remission of tuition are determined by the college the student is attending. In general, tuition is defined to include all tuition and fees charged by the college with the exception of room, board, and special fees not charged to all students. More details about the program can be found at: <http://glca.org/programs/tuition-remission-exchange1>

National Tuition Exchange program

Scholarships cover full tuition, one-half tuition for a non-resident at a public institution or a rate set by The Tuition Exchange. They do not cover special fees, course overloads, or room and board charges. For 2014-2015, institutions that charge more than \$32,500 for tuition are permitted to award less than their full tuition, but not less than the set rate of \$32,500 (\$33,000 for 2015-2016). The Tuition Exchange scholarships are not guaranteed; they are competitive awards for which you apply. Each institution must maintain a balance between students sent to other schools on the exchange (exports) and students received on the exchange (imports). Members also are required to set up a mechanism to establish priority for exports. When there are many more exports than imports,

the institution may not sponsor new students. These factors may affect your ability to earn a scholarship through the exchange. See www.tuitionexchange.org for more info.

Northwest Independent Colleges Tuition Exchange

As previously announced, The Northwest Tuition Exchange, is closed to new enrollees following the 2015-16 matriculation year. Please contact HR with questions.

For those eligible dependent children that already attending a participating school, they may receive up to eight (8) semesters of 100% tuition remission for full-time undergraduate attendance. Both the employee and the child must meet the eligibility criteria. Scholarships awarded through the Northwest Exchange cover full tuition; however, room and board and course-related fees other than tuition are not covered.

Other Considerations

Taxability

Tuition Remission benefits for legally dependent children as claimed on federal tax forms of an employee are not considered to be taxable income by the IRS.

Other Financial Aid

Anyone who is eligible for any type of state or federal grant, or other financial aid, should not forego timely application for such benefits on the assumption of receiving tuition remission/exchange benefits. It is advisable to continue such applications and in the event that a tuition remission scholarship/benefit is awarded, notify the office of such financial aid benefits of the award to determine if there are any required reductions in benefits.

Information for this communication is based on Tuition Remission Policies found in the Staff and Faculty handbooks, as well as standard practices and procedures utilized in administering tuition remission benefits. Where this communication and the policy vary, the policy shall govern.

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