

MARSHALL UNIVERSITY BOARD OF GOVERNORS

Rule No. AA-5

EMPLOYEE DEPENDENT UNDERGRADUATE TUITION ASSISTANCE PROGRAM

1 General Information.

- 1.1 Scope: This policy establishes a tuition assistance program for certain dependents of employees.
- 1.2 Authority: W. Va. Code §18B-1-6
- 1.3 Passage Date: August 9, 2022
- 1.4 Effective Date: September 13, 2022
- 1.5 History:
 - 1.5.1 This version of this policy modifies MUBOG Policy No. AA-42 (effective October, 28, 2015) by adding a section related to the dependents and deaths of two parents. This policy modifies MUBOG Policy No. AA-42, Employee Dependent Undergraduate Tuition Assistance Program (effective April 20, 2009), which replaced MUBOG Policy AA-42 Marshall Dependent Scholarships (effective June 28, 2006), which replaced Executive Policy Bulletin No. 14, effective April 26, 2000.

2 Introduction.

- 2.1 In order to allow students who are dependent children of Marshall University employees to obtain a college degree at the University at a significantly reduced cost to the student and the student's family, the Marshall University Employee Dependent Undergraduate Tuition Assistance Program (the "program") will provide a tuition remission benefit to all qualified dependents of eligible University employees.

3 Definitions.

- 3.1 **Eligible Employee:** "Eligible employee" is any faculty member, classified employee, or non-classified employee of Marshall University who is employed for 0.53 FTE or greater and who is a state employee eligible for membership in a retirement system of the State of West Virginia or other retirement plan authorized by the state and has been employed by the University continuously in this status for at least 180 days prior to the beginning of the semester of application for the program. The Office of Human Resources will verify employment status.
- 3.2 **Dependent:** "Dependent" is any natural-born or adopted child of an employee who is twenty-five years of age or younger; or any other "qualifying child" of the employee as defined by the Internal Revenue Service; is 25 years of age or younger, and has been claimed as a dependent on the employee's federal income tax return for the two complete tax years immediately preceding the first enrollment in the program. Copies of the Federal Form 1040 (or 1040A) U.S. Individual Income Tax Returns for the appropriate years may be requested to verify dependent status. The Office of Human Resources will verify dependent status.
- 3.3 **Qualified:** The dependent of an eligible employee shall be considered "qualified" for the program if the following criteria are met:
 - 3.3.1 The student dependent has been admitted to the University.

- 3.3.2 The student is a degree-seeking, full-time undergraduate.
- 3.3.3 The student dependent is making satisfactory academic progress as determined by the Office of Student Financial Assistance and described on that office's web site.
- 3.3.4 The student is not on academic probation.
- 3.3.5 The student is not on social probation.
- 3.3.6 The student has applied for the PROMISE scholarship if eligible to receive it.

4 Benefit.

- 4.1 The program will provide a tuition remission benefit in the amount of the total of the Capital Fee and the Education and General (E&G) Fee for resident students. For non-resident and metro students, the value of the tuition assistance benefit will be no more than the amount of the two combined fees for resident students.
- 4.2 For non-resident and metro students, the tuition assistance provided in this program cannot be combined with any other tuition waiver-based financial aid assistance to have a total value of more than the amount of Capital and E&G Fees for each semester. There is no limitation on combining the assistance from this program with privately-funded or other non-institution-funded (e.g. Pell Grant, WV state grant program, etc.) financial assistance.
- 4.3 The program provides the benefit during the fall, spring, and summer terms.
- 4.4 Except as provided in Section 5 below, the tuition assistance benefit does not pay for any fees other than the Capital and E&G fees waived. Such other fees include auxiliary fees, recreation center fees, E-course delivery fees, college/program fees, course fees, late fees, etc.
- 4.5 The program does not provide assistance for books, parking, and other expenses incurred by the student. .

5 Alternative Benefit.

- 5.1 If a program participant is the recipient of a PROMISE Scholarship for payment of tuition or the recipient of any other privately-funded, tuition-only scholarship, then the student may elect to receive an alternative benefit.
- 5.2 The alternative benefit will take the form of
 - 5.2.1 A "bridge the gap" remission of the difference between the amount paid by the PROMISE Scholarship (or other privately-funded, tuition-only scholarship) and the total of the mandatory tuition and fees (Capital Fee, E&G Fee, Auxiliary Fee, Rec Center Fee, college/program fees, E-delivery fees, etc.) that would normally be charged to the student; and
 - 5.2.2 A partial remission of room and board fees to assist in covering the cost of residing in a Marshall University residence hall. The amount of this remission is equal to the amount of the normal benefit under this program minus any amount used in the "bridge the gap" remission described in part (5.2.1).
 - 5.2.3 The total received under the Alternative Benefit shall not be more than the amount of the benefit normally received under this program as described in Section 4.1.

6 Change in Employment Status

- 6.1 In the event of a program-eligible employee's retirement, total disability, or death after completion of at least ten (10) years of University service, the employee's dependent(s) will retain initial eligibility for the tuition assistance program for a period of five (5) years after the event and will retain the full four years of eligibility.
- 6.2 In the event that both parents or guardians are program-eligible employees and both die with a combined University service of at least fifteen (15) years, the employees' dependent(s) will retain initial eligibility for the tuition assistance program for a period of fifteen (15) years after the second death and will retain full four years of eligibility. In addition, if the second employee was a resident of West Virginia at the time of death, the dependent(s) will be considered residents for the purpose of setting tuition rates when applying to the university regardless of where they reside in the intervening years.
- 6.3 The tuition assistance for a semester will be rescinded if, for some reason other than those identified in 6.1 above, the sponsoring employee is not employed by the University on the first day of the semester. Separation from employment during the semester does not affect the tuition assistance for the current semester.

7 Restrictions

- 7.1 A student may not participate in the program after four years have elapsed following the student's first participation in the program. Students withdrawing from the University due to medical, military, or other involuntary reasons may appeal for an extension of the time limit as described in section 8.1 of this policy.
- 7.2 In any instance in which a student receives the benefit PLUS one or more other tuition waiver-based financial aid awards, the value of the benefit will be reduced such that the total of all waiver-based awards (including the benefit) is not greater than the total of the student's Capital Fee and Educational and General Fee.
- 7.3 The employee must apply for the benefit by the appropriate due dates for each semester.
- 7.4 The student must meet the qualifications listed in section 3.3 for each semester of application.
- 7.5 If an application is submitted after the first due date, it will be the student's responsibility to pay up-front all of the fees due for that semester by the established fee payment deadline.
- 7.6 The program does not provide benefits retroactively for past semesters.
- 7.7 The Office of Student Financial Assistance will provide applications and determine all applicable due dates and other application requirements as may be necessary.

8 Appeals

- 8.1 Appeals of decisions by the Office of Student Financial Assistance regarding this benefit should be made in writing to the Director of Student Financial Assistance within thirty days of the notice of the decision. Appeals will be acted upon by the University Scholarship Policy Committee.

9 Administrative Procedure

- 9.1 The director of student financial aid is responsible for developing, implementing, and administering a sufficient administrative procedure to effectuate the provisions of this policy.