

JACKSONVILLE STATE UNIVERSITY
Manual of Policies and Procedures

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REVISION/REVIEW DATES: Mar 1993, May 1997, Oct 2002, Nov 2008, Aug 2011, Mar 2012, Oct 2013, Dec 2014, Aug 2017, Nov. 2018, June 2019, August 2019, January 2020, January 2021, July 2023, July 2025

SUBJECT: Tuition Assistance Program Policy

APPROVED: Dr. Don C. Killingsworth, Jr., President

PURPOSE

The Purpose of this Policy is to establish guidelines for the administration of Jacksonville State University's (JSU) Tuition Assistance Program. The continuation of the Program is at the sole discretion of JSU and JSU may withdraw, alter or amend the Program at any time.

POLICY

JSU offers tuition assistance as a potential benefit for eligible and approved regular full-time employees (faculty and staff), and ROTC employees who have been employed in a full-time capacity for at least one year. Eligible service retirees may also participate in the Program This Policy allows eligible participants and their dependents the opportunity to further their education by attending classes at JSU. JSU reserves the right to cease providing tuition assistance at any time or to otherwise revise this policy.

<u>DEFINITIONS</u>	
Eligibility Date:	Date after one calendar year of continuous full-time employment
Eligible Dependent:	<ul style="list-style-type: none">• Spouse And/or <ul style="list-style-type: none">• Unmarried, unemancipated children, foster-children, stepchildren, up to age 26
Eligible Employee:	A full-time, benefit eligible employee of JSU or JSU's ROTC department with at least one (1) year of full-time service
Service Retiree:	JSU retirees receiving benefits from the Teacher's Retirement System
Program Participant:	An employee or dependent established as eligible (as defined above) and is receiving tuition assistance

¹ The definition of spouse is dependent on current state law to align with eligibility for other benefits (e.g., PEEHIP).

Proof of Dependent Eligibility:

Spouse	Marriage Certificate
Unmarried, Unemancipated Child, under age 26	Birth Certificate
Unmarried, Unemancipated Stepchild	Birth Certificate and Marriage Certificate (establishing that the stepchild is the child of the employee)
Unmarried, Unemancipated Foster Child	Documentation from appropriate Foster Care Agency/Authority

Employee / Service Retiree Eligibility:

- All regular full-time employees who have successfully completed one (1) year of full-time service are eligible.
- Participation is contingent upon supervisory approval and verification of eligibility status.
- Jacksonville State University retirees (Service Retirees) receiving benefits from the Teachers' Retirement System.
- Temporary, adjunct, visiting instructors, and part-time employees are **not** eligible for tuition assistance. Also, employees on probation or a performance improvement plan may be ineligible for tuition assistance.

Dependent Eligibility:

- Eligible Dependents of Eligible Employees (as defined above), Service Retirees, and ROTC employees are eligible
- Eligible dependents of deceased employees, who died while in service to JSU and who held a full-time regular position, or who died while receiving retirement benefits or disability benefits, may receive tuition assistance until age 26.

Eligibility Limitations: Dependents become ineligible for tuition assistance if they:

- 1) cease to be dependents (i.e., marriage)
- 2) when for any dependent other than a spouse, the person reaches age 26 prior to the beginning of the semester

Eligibility Dates: Employees become eligible for Tuition Assistance after one calendar year of continuous full-time employment.

- An employee must be in an eligible employment status at the University on the **first** day of class (Fall, Spring, or Summer semester) in order to be eligible for tuition assistance.
- Eligibility of dependent status is established on the **first** day of class
 - If a dependent loses dependent status prior to the first day of class, he/she will not receive tuition assistance even if previously approved;
 - If a dependent or employee becomes ineligible after the first day of class, the student will become ineligible for tuition assistance in future terms, even if previously approved and awarded.
 - If an employee or dependent withdraws from a course, tuition assistance will only be adjusted if the charges for the course are reduced.

- Employees are responsible for notifying the Department of Human Resources (HR) regarding any information that would affect eligibility for this educational benefit.
 - If it is later determined that the employee was not eligible, the educational benefit will be recalled, and the appropriate charges will be billed to the program participant's student account.

GPA Eligibility Requirements:

Eligible Program Participants without an established Institutional GPA will receive tuition assistance for the 1st applied/eligible academic year. If a student entering the university has a GPA earned from previous attendance (including dual enrollment and police academy), the established Institutional GPA will be used to determine the eligibility for tuition assistance.

After the first year, eligibility is based on cumulative institutional GPA. Employees and dependents will receive tuition assistance based on the following minimum JSU institutional GPA:

- | | |
|-----------------|-------------------------------------|
| ○ Undergraduate | Cumulative Institutional GPA of 2.0 |
| ○ Graduate | Cumulative Institutional GPA of 3.0 |

The determination date for GPA will be established annually, after completion of the summer term. If the GPA drops below the minimum requirements, the employee or dependent will not be eligible for tuition assistance for the upcoming academic year.

Application Requirements for Tuition Assistance: An application for tuition assistance is made for an academic year and must be submitted for each future academic year. To apply for tuition assistance:

- Program Participants must complete the electronic **Tuition Assistance Request Form** located in MyJSU/Employee Tab/Human Resources.
- The electronic form must be submitted **no later than the first day of class** for the first semester/sub-semester tuition assistance is being requested.
- The electronic form must be routed (to a JSU email) and signed by the dependent (if request is for a dependent) or by your supervisor (if the request is for the employee).
- Students approved for Tuition Assistance must email to notify scholarships@jsu.edu if:
 1. registered for classes outside their student classification – e.g., Graduate Student enrolled in an Undergraduate course, or
 2. changes to the class schedule are made after the application of tuition assistance to the student account.

Pilot terms, such as Winter Term, will be included in the applicable terms for Tuition Assistance. Any eligible employee or dependent that has been approved to receive Tuition Assistance for the current academic year is eligible to receive Tuition Assistance for the pilot term. A separate application is not required for this term. Tuition Assistance will be applied as a tuition exemption/waiver, rather than a scholarship, for this term only.

Process:

1. The Registrar's Office and Graduate Studies will determine the GPA and verify academic record prior to forwarding the Form to the Department of Human Resources (HR).
 - a. An Incomplete (I) is not associated with a grade and has no effect on a student's GPA. However, for the purposes of this Policy, at the time of the GPA verification if a student has an Incomplete (I), that Incomplete (I) will be calculated as an F.
 - b. For example, a student has three A's and one Incomplete. The GPA will be calculated as 3.0, not as a 4.0.
2. HR is responsible for verifying employment records prior to forwarding the form to the Financial Aid Office.
3. The Financial Aid Office will apply the tuition assistance to the student's account.

There will not be retroactive tuition assistance.

Tuition Assistance

100% of tuition is covered for the allowed credit hours listed below for employees and dependents.

Employees:

Level	Tuition (credit hours)	Fees
Undergraduate:	Up to 9 credit hours per semester; including on-line learning fee	General University Fee (GUF) is covered
Graduate: (Non Doctoral)	Up to 9 credit hours per semester including on-line learning fee	The General University Fee (GUF) and on-line learning fee is covered

*Employees are responsible for any course or program fees, and, if desired, membership fees to the Recreation and Fitness Center.

Eligible Dependents/Service Retirees:

Level	Allowed hours	Fees
Dual Enrollment:	Up to 9 credit hours per semester; including on-line learning fee	Not covered by tuition Assistance (except for on-line learning fee)
Undergraduate:	Up to 18 credit hours per semester; including on-line learning fee	Not covered by tuition Assistance (except for on-line learning fee)
Graduate: (Non Doctoral)	Up to 6 credit hours per semester; non doctoral	Not covered by tuition assistance

*Employees and service retirees are responsible for any course or program fees, and, if desired, membership fees to the Recreation and Fitness Center.

The credit hour limits above will go into effect Fall 2023 for all employees, service retirees, and dependents Effective Fall 2024 employees, service retirees, and dependents can only obtain one undergraduate and one graduate degree using tuition assistance.

NOTE: Tuition assistance for graduate courses may be considered taxable income by the IRS; JSU will follow IRS guidelines regarding taxability.

Awarding Tuition Assistance and Other Scholarships: Tuition assistance is only in the form of tuition reduction and will not be paid as cash. Tuition assistance will be applied to the student's account before scholarships from other institutional funds.

Effective Fall 2023: Tuition Assistance will be applied first, covering tuition, and online course fees. Then, the merit funds will be applied to cover any remaining tuition or online course fees, general university fee, housing, textbooks, and meal plan. If the student also has scholarships from external sources or the JSU Foundation, those will be applied last to cover any remaining balance. Only funds from external sources may be refunded.

Effective Fall 2024: Students receiving institutional merit aid in addition to tuition assistance may apply the institutional merit aid to cover, up to and including, the following charges: General University fees, housing (limited to Crow, Curtiss, Dixon, Fitzpatrick)² and the required housing meal plan. No refunds will be disbursed for any unused institution merit aid. Students who receive scholarships from a non-university funded source may receive a refund for any excess funds available from the non-university funded source.

Potential Payback Obligation:

Beginning with Tuition Assistance received for the first time for any person in the Fall of 2023, if an Eligible Employee does not remain employed at JSU for two years from the date of the last tuition assistance received (whether for the Eligible Employee or Eligible Dependent), the Employee shall be required to reimburse JSU for the amount of the tuition benefit received. The Payback Obligation may not apply if the Employee is terminated as part of a reorganization or reduction in force or service retirement. The Potential Payback Obligation does not alter an employee's "at will" status and JSU may terminate the employment relationship of any such employee for any lawful reason regardless of whether such Employee has participated in the Tuition Assistance Program.

Employee Class Attendance: The University will allow employees to attend only one in person course during the respective work hours with the employee's supervisor approval. An employee taking an in-person course during working hours must account for the time away from work by: a) taking annual leave; b) using accrued comp time; or c) with the approval of the employee's supervisor either make up the time during the work week and/or modify their respective work schedule to accommodate for the missed time so long as such schedule change does not conflict with departmental operations (See Class Attendance Policy 1:03:01 for details).

² Excluding the International House.

Employees may not attend any on-line course or execute any course work during respective work hours other than provided above.

Auditing: Tuition assistance does not apply to auditing classes.

Any exception to this policy must be approved by the President.

RESPONSIBILITY

This policy is the responsibility of the Senior Vice President for Finance and Administration and CFO.

EVALUATION

This policy will be evaluated at least every five (5) years by the Department of Human Resources.