



# TUITION BENEFITS FOR FACULTY AND STAFF OF WILLAMETTE UNIVERSITY

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## **“Dependent” Tuition Remission**

### **Benefit**

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#### **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 below. Benefits apply only to tuition costs and not to any course-related expenses such as lab fees, books, and room and board.

#### **Tuition Exchange**

Subject to the same eligibility criteria as required for Tuition Remission at Willamette University, children of Willamette faculty and staff may receive up to eight (8) semesters of undergraduate tuition exchange benefits through either the Northwest Tuition Exchange program or the National Tuition Exchange program. As with Tuition Remission for attendance at Willamette, the child must be accepted for enrollment in a participating school to be eligible for tuition exchange.

#### **Approval**

Awards through the National Tuition Exchange program are competitive and are not automatic. Awards through the Northwest Tuition Exchange program are generally extended as long as the student is **accepted and admitted** into the institution.

**\*\* Please Note that Limitations may apply in the event that a school fails to meet “balance” requirements, or withdraws from exchange. \*\***

#### **Amount of Award**

Scholarships under the National Exchange cover full tuition, or a rate set by the Exchange, but generally not special fees, course overloads, or room and board charges. For the 2010-2011 academic year, institutions that charge more than \$30,000 for tuition are permitted to award less than their full tuition, but not less than \$30,000. Some colleges cover other expenses, such as room and board in their awards. Some member institutions reduce their scholarships by the amount of federal and state grants awarded to a student, whether or not they are based on financial need. (See [www.tuitionexchange.org](http://www.tuitionexchange.org) for more info)

**\*\* As of 2011, important changes specific to the Northwest Exchange have occurred which will eventually lead to the end of the program. The University has assembled a task force to make recommendations for program changes and to address the upcoming end to the Northwest Exchange program. Currently, dependents of faculty and staff may still send their children to the University of Puget Sound and Lewis and Clark under the Northwest Exchange. Scholarships awarded through the Northwest Exchange cover full tuition; however, course-related fees other than tuition are not covered. \*\***

### **Eligibility**

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#### **Employee**

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**

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

- 1) *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.*
- 2) *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.*
- 3) *Eligibility continues until the calendar year following the year in which a child reaches the age of 24 years, 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**

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- 1) **Apply for Admission**  
*The dependent child should begin the process of applying for admission to Willamette and/or Exchange schools as soon as possible in the year prior to actual enrollment.*
- 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 February 1<sup>st</sup> for both new and renewal applicants. A copy of the employee-parent's most recent 1040 form showing dependent status of the child must be submitted with the application.*
- 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 applications to Financial Aid and Registration, if the application includes a request for Willamette Tuition Remission. If the application includes schools within the Northwest Exchange, HR completes an eligibility verification form and submits it to the appropriate school. If the application includes schools within the National Exchange, HR submits eligibility certification through the National Exchange website.

**5) Benefit is Processed**

Upon acceptance to Willamette, Financial Aid applies tuition remission benefits against the student's tuition bill.

*If admitted to a Northwest Exchange school, the business office of the exchange school sends confirmation of acceptance of tuition exchange to both the dependent/parent and to Human Resources at Willamette, and applies the tuition benefits to the student's tuition.*

*If admitted to a National Exchange school and awarded an exchange scholarship, the admissions office of the exchange school determines the amount of the scholarship award and applies benefits against tuition or other expenses. Again, awards tend to be quite limited under the National Exchange and are merit-based. Admission to the school does not guarantee that a scholarship will be awarded. The National Exchange school will notify applicants concerning approval/rejection of tuition exchange scholarship applications.*

**\*\* Important Note:** As of 2011, **important changes** specific to the Northwest Exchange have occurred which will eventually lead to the end of the program. The University has assembled a task force to make recommendations for program changes and to address the upcoming end to the Northwest Exchange program. Currently, dependents of faculty and staff may still send their children to the University of Puget Sound and Lewis and Clark under the Northwest Exchange. Scholarships awarded through the Northwest Exchange cover full tuition; however, course-related fees other than tuition are not covered. \*\*

## **Other Considerations**

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### Taxability

Tuition Remission benefits for legally dependent children 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.

### 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 preceding the academic year for which tuition remission/exchange benefits are being requested!**

**Information for this communication is based on Tuition Remission Policies found in the Classified, Administrative 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.**