

DIVISION: <b>ADMINISTRATION/HUMAN RESOURCES</b>	
SUBJECT: <b>Tuition Remission – Spouse/Dependent Children</b>	Page 1 of 8
Policy Number:	Supersedes: <b>Tuition Remission (Spouse/Dependent Children)</b>
Effective Date: <b>11/04/16</b>	Previously Issued: <b>08/09/16</b>

**1. STATEMENT OF POLICY:**

The University offers tuition remission benefits to eligible faculty and staff, as well as their spouses and qualifying dependent children, as part of its overall benefits package. As an institution of higher education and one steeped in traditions which place a high value on education and learning, the University extends this benefit, as defined by policy, to competitively recruit and retain an excellent faculty and staff, as well as to support their, as well as their spouse’s/dependent child(ren)’s, academic and professional goals. Tuition remission benefits are a privilege, not a right.

The purpose of this policy is to clearly explain the responsibilities and parameters by which tuition remission benefits become available, the limits to these benefits and the conditions under which the benefits might be forfeited. Any exception to the tuition remission policy must be approved in writing by the Vice President for Human Resources, unless otherwise noted in the policy. The University reserves the right to revise, supplement or rescind any provision or term in this policy, from time to time, at its sole discretion.

**2. DEFINITIONS:**

For purposes of this policy only:

**“Dependent Child”** is a child or step-child of a full-time faculty or full-time, regular or term staff member or eligible retiree. In order to be eligible, a dependent child must be 25 years of age or younger at time of matriculation<sup>1</sup>. This definition applies only to the issue of eligibility for tuition remission benefits. It does not relate to whether tuition remission benefits received will be considered taxable income to the related family member. Faculty/staff with questions regarding the taxability of tuition remission benefits are encouraged to obtain counseling from their personal tax consultant.

**“Eligible Retiree”** is an individual who was, at time of retirement, at least 65 years of age and a tuition remission benefits eligible faculty or staff member with 10 years of service with the University (or 5 years of service with the University if hired at age 55 or older).

**“Spouse”** includes partners to a lawful marriage and Registered Domestic Partners, as defined by State law. The terms “spouse” and “registered domestic partner” are used interchangeably.

<sup>1</sup> For purposes of this policy, the term ‘matriculation’ is defined as the date the dependent child is accepted into the program for which they seek tuition remission benefits, provided that he/she does not defer admission.

### 3. POLICIES/PROCEDURES:

#### **Eligibility for Benefits**

The spouse and dependent child(ren) of full-time faculty members, full-time, regular and term staff members and eligible retirees are eligible for tuition remission benefits for undergraduate and graduate courses, provided certain requirements are met.

Eligibility for tuition remission benefits is determined on a semester by semester basis. In order to be eligible, the related faculty/staff member must be employed as a full-time faculty member or a full-time, regular or term staff member or be an eligible retiree on or before the first day of classes as set forth in the University or Loyola Law School Bulletin.

The spouse/dependent child's eligibility for tuition remission benefits is determined at the time the Tuition Remission Form is submitted to Human Resources. A change in the work status of the spouse/dependent child's related faculty/staff member will not impact the tuition remission benefit entitlement for that semester or session.

The spouse/dependent child will continue to receive tuition remission benefits during any period his/her related faculty/staff member is on a University approved leave, other than a personal leave of absence. If the related faculty/staff member is on a personal leave of absence, the spouse/dependent child will continue to receive tuition remission benefits until the end of the semester or session in which the spouse/dependent child is currently enrolled.

Tuition remission benefits for a spouse/dependent child cease on the date the faculty/staff member separates from the University unless the faculty/staff member qualifies as an eligible retiree, or as set forth below. If the separation date occurs after classes have started for that semester or session, the spouse or dependent child will continue to receive the tuition remission benefit for classes in which they are enrolled on the separation date.

On the occasion that a full-time faculty member or a full-time, regular or term staff member's employment is separated due to death or total disability, as defined by law, the following shall apply:

- A spouse/dependent child currently enrolled in a degree/credential/certificate program at the University or Loyola Law School shall continue to receive tuition remission benefits as though the related faculty/staff member remained employed until the degree/credential/certificate is completed. All limitations on this benefit set forth in this policy shall apply to such spouse/dependent child, including time limits for degree/credential/certificate completion set forth in the appropriate academic Bulletin.
- A spouse/dependent child who is not currently enrolled in a degree/credential/certificate program at the University or Loyola Law School at the time of death/disability of the related faculty/staff member will maintain eligibility for tuition remission benefits provided that the related employee completed ten years' service on or before his/her death/total disability, as defined by law. It is incumbent upon the spouse/dependent child to apply for tuition remission benefits in accordance with the procedures and deadlines set forth in this policy. The University will not reimburse tuition remission benefits for which the spouse/dependent child did not timely apply.

## **Admissions and Academic Eligibility Requirement**

Eligibility for tuition remission benefits does not guarantee admission to any academic program. A spouse/dependent child must meet the admissions requirements in order to be admitted to any Undergraduate or Graduate/Law School program or under non-degree status. Admission into any academic program is never guaranteed and competition may be intense for a limited number of available openings.

The application and admission processes with their stated requirements and requisite costs are the spouse/dependent child's responsibility and must be complete before the spouse/dependent child is eligible for any tuition remission benefits.

## **Use of Tuition Remission Benefits**

### *Costs Covered By Tuition Remission Benefits*

Tuition remission benefits are a tuition credit that is applied to a matriculating spouse's/dependent child's student account. The amount of tuition remission credit provided, described in detail below, depends on the type of course taken. The tuition amount will be credited after the official add/drop period has ended and all revisions to course load and/or tuition charges have been processed by the Registrar's Office.

Tuition remission benefits apply only to tuition costs. A spouse/dependent child receiving tuition remission benefits is responsible for payment of all fees and for the costs of books, materials or lab costs, health & welfare costs and any other incidental costs related to any courses taken pursuant to this Policy.

### *Permissible Degrees/Courses*

In order to be eligible for tuition remission benefits, courses must be taken at the University, Loyola Law School or, in the case of Study Abroad programs, at an approved institution.

### Undergraduate/Graduate/Doctoral Degrees

If qualified, an eligible spouse/dependent child may apply tuition remission benefits to undergraduate courses taken at LMU towards completion of a single undergraduate degree from the University.

In addition, if qualified, an eligible spouse/dependent child may apply tuition remission benefits to graduate courses taken at LMU/Loyola Law School towards completion of a single Masters or Doctoral degree from the University or *Juris Doctor* degree from Loyola Law School<sup>2</sup>. An eligible spouse/dependent child may also apply tuition remission benefits to the JD/MBA, MS/MBA, or other dual Masters degree program.

Eligible spouses/dependent children receive 100% tuition remission credit for undergraduate/graduate courses taken at LMU/Loyola Law School towards completion of a degree.

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<sup>2</sup> Tuition remission benefits may not be applied to the Ed.D program.

### Undergraduate/Graduate Courses Taken Under Non-Degree Status

If qualified, an eligible spouse/dependent child may apply tuition remission benefits to undergraduate or graduate courses taken at LMU under non-degree status. All Bulletin restrictions and requirements apply to courses taken under non-degree status including, but not limited to, restrictions on the number of units/semesters in which an individual may enroll under non-degree status. Eligible spouses/dependent children receive 100% tuition remission credit for courses taken at LMU under non-degree status.

### Undergraduate/Graduate Courses Taken Pursuant to Credential/Certificate Program

If qualified, an eligible spouse/dependent child may apply tuition remission benefits to undergraduate or graduate courses taken towards completion of a credential or certificate program offered by one of the University's six Colleges/Schools.<sup>3</sup> Eligible spouses/dependent children receive 100% tuition remission credit for courses taken at LMU towards completion of an approved credential/certificate program.

### Study Abroad Programs

#### ***Semester Study Abroad Programs***

##### *Eligibility for Benefit*

An eligible spouse/dependent child enrolled in a degree program at LMU may apply tuition remission benefits to an approved Semester Study Abroad program administered/sponsored by LMU.

##### *Approved Semester Study Abroad Programs*

Tuition remission benefits may be applied to the following approved Semester Study Abroad programs: LMU administered/sponsored programs in England and Germany, and AJCU administered/sponsored programs in Beijing, China and El Salvador. Additional semester study abroad programs may, at the sole discretion of the University, be deemed eligible for tuition remission benefits. Human Resources will maintain a list of all approved undergraduate semester study abroad programs eligible for tuition remission benefits.

##### *Amount of Tuition Remission Benefits*

Only the tuition portion of the program costs (as determined by the University) for semester study abroad programs that the University deems eligible for tuition remission benefits will be credited as a tuition remission benefit. The non-tuition program fee is the responsibility of the matriculating spouse/dependent child.

Tuition remission benefits do not cover incidental costs, such as textbooks, travel expenses, meals, *etc.* All other such costs and fees are the responsibility of the matriculating spouse/dependent child.

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<sup>3</sup> Credential/certificate programs offered through LMU Extension are not eligible for tuition remission.

***Summer Session Study Abroad Programs Administered/Sponsored by LMU******Eligibility for Benefit***

An eligible spouse/dependent child enrolled in a degree program at LMU may apply tuition remission benefits to an approved Summer Session Study Abroad program administered/sponsored by LMU.

An eligible spouse/dependent child who is enrolled full-time at another accredited institution<sup>4</sup> may apply tuition remission benefits to an approved Summer Session Study Abroad program under non-degree status, provided the following conditions are met:

- The Summer Session Study Abroad program must have reached its minimum, per program enrollment with tuition-paying registrants.
- The Summer Session Study Abroad program must have space available. If a Summer Session Study Abroad program has met its maximum program enrollment, a non-degree spouse/dependent child applying tuition remission benefits may not take the place of a tuition-paying registrant.

***Approved Summer Session Study Abroad Programs at LMU***

Human Resources will maintain a list of approved undergraduate Summer Session Study Abroad programs administered/sponsored by LMU.

***Amount of Tuition Remission Benefits***

Only the tuition portion of the program costs (as determined by the University) for Summer Session Study Abroad programs administered/sponsored by LMU will be credited as a tuition remission benefit. The non-tuition portion of the program fee is the responsibility of the matriculating spouse/dependent child. Tuition remission benefits do not cover incidental costs, such as textbooks, travel expenses, meals, *etc.* All other costs and fees are the responsibility of the matriculating spouse/dependent child.

For further information regarding eligible programs and benefits, please see, “Chart A – Spouse/Dependent Child Eligibility & Tuition Remission Benefits By Type of Course”. For further clarification regarding the eligibility of courses/programs, consult Human Resources.

**FACHEX**

The University also participates in FACHEX (Faculty and Staff Children Exchange Program) with many of the other Jesuit colleges and universities. Depending on the institution the dependent child wishes to attend, undergraduate tuition remission benefits may be available. For more information regarding the FACHEX program, please contact the Admissions Office at the Westchester campus.

**TUITION EXCHANGE**

The University also participates in the Tuition Exchange Scholarship program, a nonprofit national association that administers a reciprocal scholarship program for children of eligible faculty and staff with

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<sup>4</sup> Pursuant to Study Abroad program requirements, non-LMU students must be enrolled as full-time students at another accredited institution in order to be eligible to enroll in a Study Abroad program.

over 600 participating institutions. Tuition Exchange is not a benefit program, but a selective and competitive scholarship. The scholarships are primarily for undergraduate study for students seeking their first bachelor's degree. A complete listing of participating institutions as well as other information is available at the Tuition Exchange Website. Depending on the institution the dependent child wishes to attend, undergraduate tuition remission benefits may be available. For more information regarding the Tuition Exchange Scholarship program, please contact the Tuition Exchange Liaison Officer in Human Resources at x84512.

### **Limitations of Tuition Remission Benefits**

The following limitations apply to tuition remission benefits:

- All degree/credential/certificate programs must be completed within the time frame specified in the applicable program Bulletin. In order to maintain eligibility for tuition remission benefits for a degree credential/certificate program, students must make satisfactory progress towards a degree credential/certificate as set forth in the appropriate Academic Bulletin.
- Tuition remission benefits for the MBA, JD/MBA, MS/MBA, or other dual MBA degree programs are dependent on the program meeting its minimum per program enrollment with tuition-paying registrants and the availability of seats in the program.
- Tuition remission benefits are not available for some programs including, **but not limited to:** LMU's EMBA program and/or LMU Extension, including Kaplan test preparation courses..
  - See, "Chart A – Spouse/Dependent Child Eligibility & Tuition Remission Benefits By Type of Course". For further clarification regarding the eligibility of courses/programs, consult Human Resources.
- An eligible spouse/dependent child receiving tuition remission benefits may not receive funds that are only for tuition from any other source (e.g., federal, state, University, or outside source) that, when combined with tuition remission benefits, exceed the cost of tuition. For additional information regarding the relationship between tuition remission and financial aid, please contact the Financial Aid Office at 310-338-2753.
- Tuition remission benefits may not be granted after the last day of registration of the semester or session for which benefits are claimed.

### **Academic & Financial Requirements**

An eligible spouse/dependent child who is receiving a tuition remission benefit must remain in strict compliance with all academic, financial and/or other University policies which may be applicable and subject to change, from time to time, at the sole discretion of the University. Failure to comply with academic, financial and/or other University policies may render the spouse/dependent child ineligible for the tuition remission benefit for current and/or future semesters or sessions. This ineligibility will continue for whatever period is needed to bring the spouse/dependent child back into compliance. During that period, the spouse/dependent child is responsible for all costs of his/her education.

### **Taxation of Tuition Remission Benefits**

The value of tuition remission benefits may be taxable. Faculty/staff members or eligible retirees seeking tuition remission benefits for a spouse or dependent child are encouraged to obtain counseling from their personal tax consultant.

### **Procedures**

To obtain tuition remission benefits, the spouse/dependent child must first follow admission procedures as set forth by the University. After being admitted, a Tuition Remission Form may be obtained from Human Resources. A Tuition Remission Form must be completed each semester in order for a spouse/dependent child to be considered for tuition remission benefits.

### **Applicability of Academic Bulletins**

If, at any time, a conflict arises between the terms set forth in this policy and the terms contained in any applicable academic Bulletin, the academic Bulletin will control determination of the issue.

**Chart A – Spouse/Dependent Child Eligibility & Tuition Remission Benefits By Type of Course**

TYPE OF COURSES	STATUS	ELIGIBILITY
Undergraduate Courses (Taken pursuant to approved degree/credential/certificate program or under non-degree status)	Eligible Dependent	Yes (Subject to all applicable taxes.)
Graduate Courses (Taken pursuant to approved degree/credential/certificate program or under non-degree status)	Eligible Dependent	Yes (Subject to all applicable taxes.)
Approved Study Abroad Programs Administered/Sponsored by LMU [with applicable conditions]	Eligible Dependent	Yes, tuition portion of program costs, <b>only</b> (Subject to all applicable taxes.)
MBA, MS/MBA	Eligible Dependent	Yes (Subject to space available and applies to tuition only. Subject to all applicable taxes.)
EMBA Program	Eligible Dependent	No tuition remission benefits
Ed.D.	Eligible Dependent	No tuition remission benefits
JD (part-time or full-time), LL.M Tax, LL.M, MLS, MT Program	Eligible Dependent	Yes (Subject to space available and applies to tuition only. Subject to all applicable taxes.)
JD/MBA, JD/LLM	Eligible Dependent	Yes (Subject to space available and applies to tuition only. Subject to all applicable taxes.)
Doctor of Judicial Science	Eligible Dependent	No tuition remission benefits
LMU Extension	Eligible Dependent	No tuition remission benefits