



University of Massachusetts

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Policy Title: Fee Waiver Policy for Spouses and Dependents of UMass Employees

Policy Number: HR-INTERNAL-02 Functional Area: Human Resources

Brief Description: The Fee Waiver Policy will replace the current practice of freezing UMass curriculum/operating fees for spouses and dependents at the 2008-2009 levels.

Effective: 9/1/2015

Responsible Office: Human Resources

Last Reviewed/Updated: NEW POLICY

REASON FOR POLICY

The Fee Waiver Policy will replace the current practice of freezing UMass curriculum/operating fees for spouses and dependents at the 2008-2009 levels. This plan, which is effective Fall 2015 semester, does not change the Board of Trustees System wide Tuition Waiver Policy for Higher Education currently in effect, nor does it reduce any benefits employees are entitled to under any current collective bargaining agreement. **This policy also does not change curriculum /operating fee benefits that the campuses currently have in place today for employees themselves who enroll in courses offered by the University.**

Please note that this policy will be revised when the university is allowed to retain in-state tuition revenue beginning in the 2016-2017 school year. At that point, we will make changes to the specific areas of the policy that may be affected by this new tuition retention reform. The value of this new benefit will remain unchanged. However, how the cost of education is portrayed will be modified to provide a more accurate reflection, which separates out tuition and the cost of core education from fees paid on other ancillary services.

DEFINITIONS

“Dependents” or “Dependent child/children” shall mean any natural, adopted or step child who is claimed as a dependent on the eligible employee’s Federal Tax Return for the tax year immediately preceding enrollment. In addition, dependents must be under the age of 26 to be considered and remain eligible for this benefit and meet the IRS standards of dependency.

“Spouse” shall mean an individual legally married to a University employee.

“Applicable fees” for which this waiver applies are the University’s undergraduate Curriculum/Operating fees.

“Part-time” shall be defined as a regular schedule of at least half-time the normal number of hours for that position (but less than full-time). Individuals must be eligible for benefits under the terms of a collective bargaining agreement or personnel policies.

“Tuition retention” shall be defined as a provision in the FY16 state budget that was signed into law by Governor Baker on July 17, 2015. Tuition retention becomes effective beginning in the 2016-2017 school year. Under this new law, the University will essentially keep the tuition it collects from students who are residents of the state, rather than remit it to the state treasury.

SPECIFIC PROVISIONS OF THE POLICY

- This plan covers eligible full and part-time undergraduate students only who enroll at any of the UMass campuses, as described below.
- Spouses and Dependents of full-time benefited employees are eligible for a waiver in the semester following the completion of two years of full-time equivalent benefited service at any of the UMass Campuses or UMass System Office.
- Spouses and Dependents of Part-time benefited employees are eligible for a waiver in the semester following the completion of four years of part-time equivalent benefited service at any of the UMass Campuses or UMass System Office.
- Spouses and Dependents enrolled as full-time or part-time undergraduate students shall be eligible to have a maximum of fifty percent (50%) of the University’s curriculum/operating fees waived (the Applicable Fees).
- This benefit is available to the Dependents and Spouses of current Full and Part time benefited UMass employees only. Dependents and Spouses of benefited employees on unpaid leave (other than Military Leave, Workers’ Compensation and FMLA) are not eligible for this benefit.
- This benefit is in effect only for the period of time in which the employee is employed by the University. Should the employee resign, or is laid off, or otherwise separated from his/her position, the waiver shall be extended only through the semester in which the separation occurred. However, the Spouse and Dependent children of eligible retired employees will continue to be eligible for the benefit after retirement. If an eligible employee who has completed at least five (5) years of full-time equivalent service dies, the surviving Spouse and Dependent Children shall be eligible to enter and/or complete one (1) full undergraduate program of study or undergraduate degree program with the waiver.
- The current practice of adhering to the 2008-2009 fee waiver amount shall end with the Spring 2015 semester.

OTHER BENEFITS NOT IMPACTED BY THIS POLICY

A. Curriculum/Operating Fees for UMass Employees

Curriculum/operating fee benefits that the campuses currently have in place today for UMass employees themselves, who meet eligibility and admission requirements as defined by the campuses and are enrolled in courses offered by the University, will remain in place.

B. Tuition Waivers for Courses at the University of Massachusetts

Tuition waivers for regularly scheduled courses excluding Continuing and Professional Education courses, as defined by the campus, are as follows:

- Full-time benefited employees, their spouses, domestic partners (1) and unmarried dependent children (through age 25) meeting eligibility and admission requirements will receive a 100% tuition waiver per semester for regularly scheduled undergraduate and graduate courses (2) (3). Spouses, domestic partners and dependent children must pay all other applicable fees.

- Part-time benefited employees must be employed at least 50% (half) time. The waiver consists of up to seven tuition-free credits per semester for employees meeting eligibility and admission requirements.

Educational Programs Covered

Tuition waivers for University Employees may be granted for all undergraduate and graduate programs at the University other than continuing education, as defined by the campus.

1. Domestic partners are eligible for tuition benefits under some bargaining unit agreements.
2. Regularly scheduled courses exclude Continuing and Professional Education courses, as defined by the campus.
3. Tuition waivers shall not be granted for the M.D. program at the UMass Medical School or for programs at the UMass School of Law.
4. Tuition waivers for graduate level courses are subject to applicable taxes.
5. An employee's effective date of employment must be prior to the first day of classes to be eligible.

Tuition waivers for Continuing and Professional Education courses, as defined by the campus

- For enrollment in any UMass non-state-supported course or program offered through continuing education, fifty percent (50%) tuition waiver shall apply.
- Tuition waiver shall apply to non-credit as well as credit bearing courses.

Limitations

1. Employees, their spouse, or dependent children receiving tuition waiver are responsible for the payment of all other educational costs, including fees (application, laboratory, etc.) books, and supplies.
2. Employees, their spouse, or dependent children must apply for admission and meet all admissions standards for the desired course/program.
3. Admission to all courses/programs in continuing education is on a space available basis. Further, each local campus administration reserves the right to cancel any continuing education course in which a minimum number of full tuition-paying students, as determined by the administration, have not enrolled.

C. Tuition Waivers for Courses at Other Massachusetts State Institutions of Higher Education

UMass employees are eligible for tuition waiver for courses offered at any Massachusetts Public Higher Education College.

- Full-time employees, their spouses and unmarried dependent children (through age 25) meeting eligibility and admission requirements will, after six (6) months of continuous service, receive 100% tuition waiver for regularly scheduled courses and 50% tuition waiver for Continuing Education courses.
- Part-time employees (employed at least 50% time, with at least six (6) months of full-time equivalent service), their spouses and unmarried dependent children (through age 25) are eligible for a 50% tuition waiver for regularly scheduled courses and a 25% waiver for Continuing Education courses.