

## PPP-13 Educational Benefits

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East Tennessee State University is committed to the need for the continued professional growth and development of employees. Support for educational assistance of personnel and their dependents is an important vehicle for addressing that need. The programs for university employees and dependents are available subject to funds being budgeted and available within the university. The Office of Human Resources is responsible for the administration of the various programs with the exception of the program for dependents of veterans (B-062) and two programs offered to general state employees and the dependents of licensed teachers and State employees (B-061).

The specific request forms for each program can be secured from the Office of Human Resources or on the Human Resource's Form Page. (Some forms are available on the Office of Financial Services web site at <http://www.etsu.edu/fa/fs>.)

### Types of Support for Educational Assistance

The Tennessee Board of Regents Guidelines for Educational Assistance (TBR Guidelines: P-130, P-131, B-061, B-062) contain a total of ten (10) programs. The Programs in P-130 provide benefits to personnel at TBR institutions, Tennessee Technology Centers and the Central Office to further their formal education. The Program in P-131 provides benefits for dependents of TBR employees. The programs in B-062 provide assistance to dependents of veterans and to state employees 65 years of age and older. The programs in B-061 provide assistance to state employees and dependents of public school teachers. The programs are:

#### TBR Guideline P-130 Educational Assistance for TBR Employees

- I. Support for Educational Assistance
- II. Taxation of Educational Assistance Programs
- III. Fee Waiver for TBR/UT System Employees Program
- IV. Faculty and Staff Tuition Reimbursement Program
- V. Employee Audit/Non-Credit Program
- VI. Faculty or Administrative/Professional Staff Grant-in-Aid (GIA) Program

#### TBR Guideline B-061 Educational Assistance for Spouse and Dependents of TBR Employees

- I. Support for Educational Assistance
- II. Fee Discount for Spouse and/or Dependent Children Program

#### TBR Guideline B-061 Educational Assistance for State Employees and Dependents of State Employees or Public School Teachers

- I. Support for Educational Assistance
- II. Types of Support for Educational Assistance
- III. Taxation of Educational Assistance Programs
- IV. Public Higher Education Fee Waiver for State Employees Program
- V. Fee Discount for Dependent Children of Licensed Public School Teachers or State Employees Program

#### TBR Guideline B-062 Other Educational Assistance Programs

- I. Support for Educational Assistance
- II. Types of Support for Educational Assistance
- III. Taxation of Educational Assistance Programs
- IV. Veterans Dependents Post-Secondary Education Program
- V. Age 65 or Above Program

Complete eligibility information is contained within each Guideline.

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Support for Educational Assistance Tables

<b>PROGRAM: Faculty or Administrative/ Professional Staff Grant-in-Aid</b>	
<b>ELIGIBILITY</b>	Regular faculty or administrative/professional staff member employed for 2+ years demonstrating institutional benefit thru academic development of working toward terminal degree, re/training, or departmental requested development on 1-time basis  Priority given to: (1) minority & female; (2) tenured faculty; (3) non-tenured personnel
<b>FEES PAID TYPE COURSE PAID NUMBER OF HOURS</b>	Institutional funds for living allowance (50% grantees monthly salary) &/or tuition or maintenance fee
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	Work for sponsoring or TBR-UT institution; 3 months for each grant month immediately after period of study or withdrawal  Failure to stay employed: loss of final paycheck & unused annual leave plus (if necessary) payment of balance in full or promissory note
<b>WHEN PARTICIPANT MAY ATTEND</b>	After approval and contract issuance and execution  < 12 months on leave of absence & enrollment as full-time student
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	< 3% of full-time faculty & admin/professional staff at institution  Contract issued & executed after presidential approval  Maintenance of complete request materials including grade reports to president  Continuation depends on satisfactory academic progress
<b>WHERE PARTICIPANT MAY ATTEND</b>	Public or private higher ed institutions (reimbursement depends on hour rate for institution attended)
<b>APPROVAL PROCESS</b>	Applicant; Immediate Supervisor; President
<b>FORM TO COMPLETE</b>	<a href="#">Faculty/Admin/Professional Staff Grant-In-Aid Contract</a> <a href="#">Faculty/Admin/Professional Staff Grant-In-Aid Form</a>

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<b>PROGRAM: Tuition Reimbursement</b>	
<b>ELIGIBILITY</b>	<ul style="list-style-type: none"> <li>• Regular part-time or full-time employee employed at a TBR institution &gt; 6 months (as of the 1<sup>st</sup> day of classes for each term) working toward terminal degree, retraining/ or departmental requested development</li> <li>• Retirees with &gt; 10 years service</li> <li>• Priority given to: (1) minority &amp; female; (2) tenured faculty; (3) non-tenured personnel</li> <li>• Requests for tuition or maintenance fee reimbursement shall be submitted at least two weeks prior to enrollment. Regular part-time employees may receive a pro rata portion of assistance based on percentage of contract for employment.</li> </ul>
<b>FEES PAID TYPE COURSE PAID NUMBER OF HOURS</b>	<ul style="list-style-type: none"> <li>• Maintenance fees, tuition, debit service fees, service charges and incidental fees for credit courses on part-time basis while continuing work</li> <li>• Fees &lt; 6 credit hours</li> </ul>
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	<ul style="list-style-type: none"> <li>• &gt; 1 month full-time employment for each month of the term enrolled (retirees excepted)</li> <li>• Passing grades in all courses (I or W not passing) (retirees excepted)</li> </ul>
<b>WHEN PARTICIPANT MAY ATTEND</b>	<ul style="list-style-type: none"> <li>• Schedule approved by supervisor (retirees excepted)</li> <li>• Times outside normal work hours unless other arrangements are made (retirees excepted)</li> </ul>
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	<ul style="list-style-type: none"> <li>• Request submitted prior to academic term</li> <li>• Institution may provide reimbursement when fees are due</li> <li>• Recipient to repay in full if coursework not satisfactory</li> <li>• Maintenance of complete request materials including grade reports to president</li> </ul>
<b>WHERE PARTICIPANT MAY ATTEND</b>	Accredited Public or Private Higher ED Institutions
<b>APPROVAL PROCESS</b>	Applicant; Immediate Supervisor; Office of Human Resources
<b>FORM TO COMPLETE</b>	<a href="#">Request for Tuition Reimbursement</a>

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<b>PROGRAM: Employee Audit</b>	
ELIGIBILITY	<ul style="list-style-type: none"> <li>• Regular part- or full-time employees (including faculty) employed at a TBR institution &gt; 6 months (as of the 1<sup>st</sup> day of classes for each term)</li> <li>• Retirees with &gt; 10 years of service</li> <li>• Regular and temporary employees &gt; 60 years of age regardless of length of service</li> </ul>
FEES PAID TYPE COURSE PAID NUMBER OF HOURS	<ul style="list-style-type: none"> <li>• Maintenance fees, tuition, debit service fees, service charges and incidental fees for credit courses on part-time basis while continuing work</li> <li>• &lt; 6 credit hours or 2 non-credit courses per semester</li> </ul>
PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY	None
WHEN PARTICIPANT MAY ATTEND	<ul style="list-style-type: none"> <li>• Scheduling approved by supervisor (retirees excepted)</li> <li>• Times outside normal work hours unless other arrangements are made (retirees excepted)</li> <li>• Space available basis</li> <li>• Register after defined registration period</li> </ul>
ACCOUNTING/ BUDGETING PROVISIONS	<ul style="list-style-type: none"> <li>• Requested submitted 2 weeks prior to enrollment</li> <li>• Departmental funds may be requested by employee</li> <li>• Account for chargebacks as an employee benefit</li> <li>• Charged institution remits to instructing institution as maintenance income</li> </ul>
WHERE PARTICIPANT MAY ATTEND	Employing or other TN public institution (employee must meet admission requirements and be subject to institutional regulations and academic procedures)
APPROVAL PROCESS	Applicant; Immediate Supervisor; Human Resources
FORM TO COMPLETE	<a href="#">Request for Education Assistance, Fee Waiver and Audit/Non-Credit</a>

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<b>PROGRAM: Fee Waiver for TBR/UT System Employees</b>	
<b>ELIGIBILITY</b>	Full-time employees (as of the 1 <sup>st</sup> day of classes for each term)
<b>FEES PAID TYPE COURSE PAID NUMBER OF HOURS</b>	<ul style="list-style-type: none"> <li>• 1 graduate or undergraduate course paid per term, not including special course fees, books, supplies, application fees, applied music fees, lab fees, off-campus facility fees, parking fees, and traffic fines</li> <li>• Courses must be for credit</li> <li>• Auditing allowed if course is a credit course</li> </ul>
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	None
<b>WHEN PARTICIPANT MAY ATTEND</b>	<ul style="list-style-type: none"> <li>• Scheduling approved by supervisor, work takes precedence</li> <li>• Employees must schedule annual leave or time off to attend classes during work hours</li> <li>• First-come-first-served</li> <li>• Register only after defined registration period</li> <li>• Employees are not considered in determining sufficient course enrollment</li> <li>• Tuition-paying students take precedence over employees</li> </ul>
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	<ul style="list-style-type: none"> <li>• Complete application and receive approval before registering</li> <li>• Account for chargeback as an employee benefit</li> <li>• Charged institution remits to instructing institution as maintenance income</li> <li>• Employee enrollment reported in new SIS category</li> <li>• TBR &amp; UT do not exchange funds for courses taken between systems</li> </ul>
<b>ELIGIBILITY</b>	Full-time employees (as of the 1 <sup>st</sup> day of classes for each term)
<b>FEES PAID TYPE COURSE PAID NUMBER OF HOURS</b>	<ul style="list-style-type: none"> <li>• 1 graduate or undergraduate course paid per term, not including special course fees, books, supplies, application fees, applied music fees, lab fees, off-campus facility fees, parking fees, and traffic fines</li> <li>• Courses must be for credit</li> <li>• Auditing allowed if course is a credit course</li> </ul>
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	None

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<b>PROGRAM: Public Higher Education Fee Waiver for State Employees</b>	
<b>ELIGIBILITY</b>	Full-time employees of TN outside TBR-UT systems
<b>FEE TYPE COURSE PAID NUMBER OF HOURS</b>	<ul style="list-style-type: none"> <li>• 1 course per term (must receive credit)</li> <li>• Tuition charges, maintenance fees, debt service fees, student activity fees, registration fees, &amp; technology access fee and RODP online course fee</li> </ul>
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	None
<b>WHEN PARTICIPANT MAY ATTEND</b>	<ul style="list-style-type: none"> <li>• Register no earlier than 4 weeks prior to first day of class</li> <li>• Tuition-paying students take precedence</li> <li>• First-come-first-served</li> </ul>
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	None
<b>WHERE PARTICIPANT MAY ATTEND</b>	Any state supported college, university, or Tennessee Technology Center
<b>APPROVAL PROCESS</b>	See back of form
<b>FORM TO COMPLETE</b>	Request for Public Higher Education Fee Waiver for Employees of the State of Tennessee (available from the State of Tennessee website)

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<b>PROGRAM: Fee Discount for Dependent Children of Licensed Public Teachers or State Employees</b>	
<b>ELIGIBILITY</b>	Children (< 24 years) of: (1) a full-time licensed teacher in any public school in Tennessee or as a full-time employee of the state of Tennessee, (2) a retired employee of the state of Tennessee who retired after a minimum of 25 years of full-time creditable service, (3) an employee that was killed in the line of duty while a full-time employee of the state of Tennessee, (4) an employee that died while a full-time employee, though not "in the line of duty". (5) a retired public school teacher that retired with the required number of years of creditable service.
<b>FEE TYPE COURSE PAID NUMBER OF HOURS</b>	Tuition includes undergraduate maintenance fees, technology center program fees, and technology access fees; it does not include application for admission fees, student activity fees, debt service fees, lab fees, applied music fees, books and supplies, dormitory charges or meal plans.
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	None
<b>WHEN PARTICIPANT MAY ATTEND</b>	Does not apply
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	None
<b>WHERE PARTICIPANT MAY ATTEND</b>	Any state operated institution of higher learning
<b>APPROVAL PROCESS</b>	See back of form
<b>FORM TO COMPLETE</b>	Request for Public Higher Education Fee Waiver for Employees of the State of Tennessee (available from the State of Tennessee website)

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<b>PROGRAM: Fee Discount for Spouse and/or Dependent Children</b>	
<b>ELIGIBILITY</b>	<p>As of 1<sup>st</sup> day of classes for each term &amp; within TBR-UT system, DEPENDENT CHILDREN &lt; 26 years &amp; SPOUSES of:</p> <ul style="list-style-type: none"> <li>• Regular full-time employees who have been admitted to any TBR-UT institution at undergraduate level</li> <li>• Regular part-time employees (&gt; 1 year continuous service, 50% time) may receive pro rata discount</li> <li>• Full-time Employees having &gt; 10 years continuous full-time service may receive discount for 5 years from date of employee's death or retirement</li> <li>• Part-time Employees having &gt; 10 years continuous part-time service may receive pro-rata discount for 2 years from date of employee's death or retirement</li> <li>• Employees having &lt; 10 years continuous full-time service may receive discount for 2 years from date of employee's death or retirement (whichever comes first)</li> <li>• Other fee waiver &amp; staff development provisions take precedence for employees who also qualify under this policy</li> </ul>
<b>FEES PAID TYPE COURSE PAID NUMBER OF HOURS</b>	<ul style="list-style-type: none"> <li>• Undergraduate courses at TBR-UT institutions up to and including full-time study.</li> <li>• Auditing allowed if course is a credit course</li> <li>• Correspondence on non-credit courses are not eligible except at Tennessee Technology Centers</li> </ul>
<b>PAYBACK PROVISIONS/ CONTINUED ELIGIBILITY</b>	None
<b>WHEN PARTICIPANT MAY ATTEND</b>	Does not apply
<b>ACCOUNTING/ BUDGETING PROVISIONS</b>	<ul style="list-style-type: none"> <li>• 50% discount on undergraduate maintenance fee &amp; mandatory student fees for dependents of full-time employees</li> <li>• Pro rata discounts for dependents of part-time employees</li> <li>• Discount not applicable to other fees (application for admission fees, applied music fees, lab fees, books &amp; supplies, parking fees, dormitory charges, or meal plans) &amp; is rounded to nearest dollar</li> <li>• Request submitted 2 weeks prior to enrollment</li> <li>• Account for chargeback as an employee benefit</li> <li>• Charged institution remits to instructing institution as maintenance income</li> </ul>
<b>WHERE PARTICIPANT</b>	TBR-UT system for undergraduate courses

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<b>PROGRAM: Fee Discount for Spouse and/or Dependent Children</b>	
<b>MAY ATTEND</b>	
<b>APPROVAL PROCESS</b>	Applicant (employee, dependent, spouse, retiree); Human Resources; Business Office
<b>FORM TO COMPLETE</b>	<a href="#">Request for Fee Discount for Spouse and/or Dependent</a>