Policy 133.1 V2 031317

**Policy Change Cover Sheet**

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| **This form must be attached to each policy presented. All areas in red, including the header, must be completed; if not, it will be sent back to you for completion.** |
|  | *I****f the changes you are requesting include housekeeping, please submit those changes to*** ***ndsu.policy.manual@ndsu.edu*** ***first so that a clean policy can be presented to the committees.*** |
| **SECTION**:  | Policy 133.1 Tuition Waiver – Spouse/Partner and Dependents |
| 1. **Effect of policy addition or change (explain the important changes in the policy or effect of this policy). Briefly describe the changes that are being made to the policy and the reasoning behind the requested change(s).**
 |
| * Is this a federal or state mandate? [ ]  Yes [x]  No
* Describe change: Adding clarifying language to policy regarding use with other tuition waivers, specific programs and removing the in or out of state tuition waiver information.
* The SBHE Policy 820 and NDUS Procedure 820.1 was amended on May 1, 2016 to establish an Employee Spouse and Dependent Tuition Waiver which provided a consistent practice across the eleven ND University System institutions.
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| 1. **This policy change was originated by (individual, office or committee/organization):**
 |
| * HR/Payroll & Customer Account Services
* Colette.Erickson@ndsu.edu and Karin.Hegstad@ndsu.edu
 |
| ***This portion will be completed by Mary Asheim.***Note: Items routed as information by SCC will have date that policy was routed listed below. |
| 1. **This policy has been reviewed/passed by the following (include dates of official action):**
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| **Senate Coordinating Committee:** | 3/20/17 |
| **Faculty Senate:** |  |
| **Staff Senate:** |  |
| **Student Government:** |  |
| **President’s Cabinet:** |  |

The formatting of this policy will be updated on the website once the **content** has final approval. Please do not make formatting changes on this copy. If you have suggestions on formatting, please route them to ndsu.policy.manual@ndsu.edu. All suggestions will be considered, however due to policy format guidelines, they may not be possible. Thank you for your understanding!

Policy 133.1

**North Dakota State University
Policy Manual
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**SECTION 133.1
Tuition WAIVer – Spouse/Partner and Dependents**

#### SOURCE: NDSU President

SBHE Policy Manual, Section 820.3

The North Dakota State Board of Higher Education and North Dakota State University encourages the family members of benefited employees to pursue a program of continuing education. The spouse/partner and dependent tuition waiver is intended to help recruit and retain faculty and staff who can best perform or support the teaching, research and public service mission of the University.

1. The spouse/partner and dependents of regular, benefitted NDSU employees as defined in SBHE Board Policy 703.2 are eligible for the waiver.

1.1  Dependents are defined as a child who is related to the employee as a natural child, a child placed for adoption, a legally adopted child, a child for whom the employee has legal guardianship, a stepchild, or a foster child, under the age of 26. Eligible dependents do not include the spouse of an adult dependent child.

* 1. Partner is defined for purposes of this policy as same sex partners who have completed and filed a Declaration of Domestic Partnership <http://www.ndsu.edu/forms/> with the Office of Human Resources/Payroll.
	2. ~~1.1.1~~ A spouse/partner or dependent who is also a regular, benefitted employee as defined in SBHE Board Policy 703.2 is only eligible for the educational benefit outlined in Section 133 (Educational Policy).
	3. A spouse/partner or dependent who is eligible for the graduate assistant tuition waiver or the cultural diversity tuition waiver are not eligible for this educational benefit. Other waivers may also not be awarded which may duplicate benefits.

1.5 The spouse/partner and/or dependents must meet admission standards and register for classes through regular registration procedures.

1.6 The employee must be actively employed two weeks prior to the first day of each semester for the spouse/partner or dependent to be eligible for the waiver.

2. The tuition waiver is 50% of the tuition for NDSU for-credit classes per spouse/partner or dependent.

2.1 This policy is applicable to any degree eligible and remedial courses, regardless of delivery or instruction mode.

2.1.1 Waivers cannot be used for third party provided curriculum where NDSU directly pays full or partial tuition collected to the third party, consortium programs such as the Great Plains IDEA consortium, or professional development courses which do not result in the award of college credit.

2.1.2 This waiver benefit is available on classes taken through the Tri-College University Course Exchange.

2.2 The maximum tuition waiver for the spouse/partner or dependent of more than one eligible employee is 50%.

2.3 Fees are not waived.

2.4 The tuition waiver applies to undergraduate, professional and graduate level classes.

2.5 Early Entry students are eligible according to the terms of this policy.

1. Procedure

3.1 A Spouse/Partner and Dependent Tuition Waiver application needs to be submitted to the Office of Human Resources/Payroll by the Monday two weeks prior to the start of classes for which the waiver is requested. The Human Resources and Payroll office will review to ensure the student is eligible as a spouse/partner or dependent of the benefitted employee. The Customer Account Services office will review the educational benefit for course and waiver exclusions, and will process the tuition waiver benefit. Given that conditions in this policy may change, it will be necessary to review the conditions of eligibility each term.

3.2 Proof of marriage, domestic partnership, and/or dependency may be required.

3.3 In accordance with federal regulations, the tuition waiver will be used as a financial resource and become part of the student's financial aid package. The Financial Aid and Scholarships office may need to adjust aid if the amount of the tuition waiver, along with other financial aid, exceeds the total cost of attendance.

3.4 The spouse/partner and dependent tuition waiver may not be received if the employee, spouse/partner or dependent has an overdue accounts receivable balance with the University.

3.5 In accordance with IRS regulations, the value of the tuition waived for graduate level classes will be considered taxable income to the employee. Federal, state and social security taxes will be deducted in a lump sum from the employee's last paycheck of the semester, or, at the employee's written request, deducted on a prorated basis throughout the semester.

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HISTORY:
New April 2002

Amended July 2003

Amended April 2005

Amended October 18, 2010

Housekeeping November 17, 2011

Housekeeping July 29, 2013

Amended March 23, 2014

Amended November 7, 2014

Housekeeping January 2, 2015