
BENEFIT PROGRAMS

EDUCATIONAL ASSISTANCE

Plan of Study

Employee Eligibility

This benefit is available to all individuals who are actively employed by SWOSU in a position that qualifies them for the University's employer paid health insurance benefits. Such employment must be held prior to the start of the semester and after one full year of employment. Individuals who meet the eligibility requirements whose employment with SWOSU ends may continue to receive the benefit during the semester in which employment ceases.

Benefits

Half Waiver – Individuals meeting the eligibility requirements may receive a 50% reduction in the general tuition cost of all courses offered by and originating with SWOSU by completing and submitting a Personnel Tuition Waiver Application to their Supervisor and Budget Head. Again, this waiver covers only 50% of general tuition and excludes any fees and taxes.

Full Waiver – Eligible employees may request a full waiver for courses that assist in the performance of their assigned duties and aid them in acquiring new skills to qualify for advancement including general electives to meet degree requirements. Such requests require the individual's Supervisor and Budget Head's approval. This waiver excludes any fees and taxes.

Restrictions

Course Load Limits – Individuals are limited to taking a maximum of three credit hours during their normal work day. Time away from an individual's work shift taking courses shall be made up at a time mutually acceptable to both the individual and the supervisor. Such make-up plans are to be indicated on the Personnel Tuition Waiver Application or, if necessary, attached to the Application. Make-up times are to be consistent and equal to the time away from work, thereby providing a routine work pattern. Make-up of lost time is to be completed during the work week in which the absence occurred.

Maximum Benefit – The total annual benefit of this program is limited to the maximum benefit allowed by the IRS.

Long-term Plans – A repayment agreement will be required for a full tuition benefit once an employee exceeds 30 hours of paid undergraduate level work. This agreement will require employees to reimburse the University for half of the tuition cost if employment with SWOSU terminates prior to the individual completing one year of additional employment for each 30 hours granted.

Graduate Courses – Individuals requesting full waivers for graduate work will be required to sign repayment agreements; generally SWOSU expects employees to commit to an additional two years for University sponsored graduate degree completion.

Application Procedure

- The individual completes a *Personnel Tuition Waiver Application*.
- The individual submits completed form to their Budget Head for approval.

- The individual's Budget Head forwards the form to the Human Resources Office. Completed forms are to be received by the Human Resources Office no later than the 10th class day of the regular semester or the 5th class day of the summer semester.

SWOSU to the extent required by law prohibits discrimination based upon national origin, race, color, gender, disability, or age.

Tuition Waiver Program for Spouse and Dependents

PROGRAM GUIDELINES AND PROCEDURES

Application Deadline: The application is to be received prior to the start of the semester by the Human Resources Office. This application will remain valid for one calendar year. Applicants not applying for the Spring semester should submit their completed applications at least ten days prior to the beginning of the term that the applicant plans to attend.

A. Qualifications (non-taxable): The applicant must be a child, stepchild, or legal ward of a full-time employee of SWOSU, a child of a vested retiree of SWOSU, a full-time employee's spouse who is not a full-time employee or retiree of SWOSU, or the child or spouse of an employee who has died or has a Social Security qualified disability received while in the service of SWOSU. An employee must have been hired prior to the beginning of a term for an applicant to receive a waiver for that term. (Vested means vested in the Oklahoma Teachers' Retirement System.)

1. A child, stepchild, or legal ward of an employee qualifies for this tuition waiver if they meet the IRS qualifications www.irs.gov and are claimed as a dependent for income tax purposes.
2. The employee's signature on the waiver application certifies that the applicant qualifies as a dependent as outlined above and qualifies for this non-taxable benefit per the IRS code requirements.
3. The applicant must be a qualified resident of Oklahoma as defined by the Oklahoma State Regents for Higher Education.
4. The waiver is for undergraduate level course work only (does not include the last two years of course work for pharmacy professional students).
5. The waiver is for undergraduate level tuition only and does not include any fees or taxes.
6. The waiver, if granted, does not apply to class auditing, workshops, non-credit courses or adult education.
7. The waiver will be limited to 12 hours of undergraduate course work per term.

B. Qualifications (taxable): The applicant will meet the same qualifications as stated above in Section A, paragraph one, but includes children that are not a dependent of the employee according to IRS qualifications and all graduate courses. This tuition waiver is a taxable benefit to the employee at the undergraduate rate (1000-4000 level courses) and graduate rate (5000 level or higher courses). **The employee understands and accepts the tax liabilities for this taxable benefit that will be reported on their W-2.** If the employee has any questions regarding this taxable benefit they should contact their tax consultant.

Availability: Waivers for future semesters will depend on the circumstances at the time of granting such future waivers.

1. The waiver program may be terminated at the discretion of the University at anytime.
2. A student must meet the retention standards as outlined in the University Catalogs.
3. A student cannot receive a waiver while on academic suspension.
4. A student cannot receive a waiver while on academic notice or academic probation unless a written appeal has been submitted to and approved by the Appeal Committee.

5. A student cannot receive a waiver while on student conduct probation.
6. If an individual terminates employment, the tuition waiver benefit will cease at the end of the semester in which employment was severed.

Financial Aid Coordination: The waiver program will be integrated with any other financial aid received from or through SWOSU. Multiple awards may be granted, but in no case shall waivers generate a cash refund or credit to be applied to other charges or fees. Total aid cannot exceed estimated cost of attendance.

Student Appeals: The student may appeal to the Tuition Waiver Program Appeals Committee for reconsideration of a denied waiver. The decision of the appeals committee is final. Send appeals to the Director of Human Resources addressed to: **Appeals Committee – Tuition Waiver Program Human Resources**