



Review of the UMD Policies and Procedures Concerning Tuition Remission (Senate Document #19-20-25)

Staff Affairs Committee | Chair: Jane Hirshberg

The Senate Executive Committee (SEC) and Senate Chair Lanford request that the Staff Affairs Committee review the proposal entitled, "*Review of the UMD Policies and Procedures Concerning Tuition Remission*".

Specifically, the Staff Affairs Committee should:

1. Review the Policy on Tuition Remission and Tuition Reimbursement for Regular and Retired Nonexempt and Exempt Staff and Faculty Employees of the University System of Maryland ([VII-4.10](#)).
2. Review the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)).
3. Review the University System of Maryland (USM) Policy on Tuition Remission for Spouse and Dependents ([VII-4.20](#)).
4. Review the University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)).
5. Review similar policies or procedures on tuition remission for employees and their spouse/dependents at Big 10 and other peer institutions.
6. Consult with the proposer, the Assistant Director of Employee Benefits in University Human Resources.
7. Consult with a representative of University Human Resources.
8. Consult with a representative of the Vice President for Administration and Finance on the types of fees that are charged to employees who take courses at the University.
9. Consult with a representative of the Senior Vice President & Provost.
10. Consult with a representative of the Graduate School.
11. Consult with a representative of the Office of the Registrar.
12. Consider whether the University's policies on tuition remission need to be aligned with provisions in the USM tuition remission policies.
13. Consider whether the University's policies on tuition remission should be revised to accommodate varying course formats.

14. Consider whether the University's policies on tuition remission should be revised to align with current practices not currently reflected in the policy, including the use of tuition remission during winter and summer sessions.
15. Consult with a representative of the Office of General Counsel on any proposed changes to the University's policy.
16. If appropriate based on the committee's consideration of the above items, recommend whether the policies should be revised.

We ask that you submit a report to the Senate Office no later than **March 30, 2020**. If you have questions or need assistance, please contact Reka Montfort in the Senate Office at reka@umd.edu or 301.405.5804.



Submitted on: November 13, 2019

Review of the Policies and Procedures Concerning Tuition Remission

NAME/TITLE	David Rieger, Assistant Director		
EMAIL	drieger@umd.edu	PHONE	X55655
UNIT	University Human Resources	CONSTITUENCY	Staff

DESCRIPTION OF ISSUE

The University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)) has not been revised since 1991. It is out of alignment with the Policy on Tuition Remission and Tuition Reimbursement for Regular and Retired Nonexempt and Exempt Staff and Faculty Employees of the University System of Maryland ([VII-4.10](#)), and does not recognize evolving trends in higher education in which courses are offered in formats outside of the traditional academic semesters (fall and spring). The policy also does not align with our current practice of providing tuition remission for courses taken during the winter and summer terms. In addition, the associated University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)) has not been updated since 1991 and is similarly out of alignment with USM Policy on Tuition Remission for Spouse and Dependents ([VII-4.20](#)).

DESCRIPTION OF CHANGE YOU WOULD LIKE TO SEE

Revise the University of Maryland, College Park Policy and Procedures Concerning Tuition Remission for Faculty and Staff ([VII-4.10\[A\]](#)) and the associated University of Maryland, College Park Procedures Concerning Tuition Remission for Spouses and Dependent Children of Faculty and Staff ([VII-4.20\[A\]](#)) to align with USM policy and current UMD practice, and to allow for varying course formats.

SUGGESTION FOR HOW YOUR PROPOSAL WOULD BE PUT INTO PRACTICE

The revised policy would support the implementation of new systems for requesting and approving tuition remission requests that UHR has already put in place.

ADDITIONAL INFORMATION

Proposed revisions to the policies are attached.

VII-4.10(A) UNIVERSITY OF MARYLAND POLICY AND PROCEDURES CONCERNING TUITION REMISSION FOR FACULTY, STAFF, AND RETIREES

I. PURPOSE AND APPLICABILITY

The University of Maryland (UMD) encourages and supports University faculty, staff, and retirees, both on the College Park Campus and within the University System of Maryland (USM), to make use of the opportunity to enroll in academic courses. Tuition remission is available to those choosing to do so in accordance with the Board of Regent's Policy VII-4.10, POLICY ON TUITION REMISSION AND TUITION REIMBURSEMENT FOR REGULAR AND RETIRED NONEXEMPT AND EXEMPT STAFF AND FACULTY EMPLOYEES OF THE UNIVERSITY SYSTEM OF MARYLAND, and the following guidelines and procedures.

II. ELIGIBILITY

Regular Status faculty and staff from all institutions within the University System of Maryland, including retirees from regular status positions, are entitled to tuition remission benefits at UMD.

III. DEFINITIONS

1. Regular status faculty or staff shall mean a person who occupies a position within the University System of Maryland through approved budgetary and appointment procedures, with the intent that such appointment is for a duration of at least six months.
2. A University of Maryland retiree shall mean a person who has previously held a regular status position within the University System of Maryland, and must be receiving a periodic distribution from the State of Maryland Retirement and Pension System and/or a Maryland Optional Retirement Plan (ORP). Retirees enrolled in a retirement plan prior to July 1, 2011 must have earned at least five years' full time equivalent (FTE) of University System of Maryland service credit. Retirees enrolled in a retirement plan July 1, 2011 or later must have earned at least ten year's full time equivalent (FTE) of University System of Maryland service credit.

IV. ADMINISTRATION OF TUITION REMISSION

1. Admissibility to a course at UMD shall be subject to UMD normal admission standards. All course prerequisites must be fulfilled.
2. Audit courses and non-credit courses shall be assigned the equivalent number of hours in determining the number of hours which may be carried, and the number of hours for which tuition may be remitted.
3. In order to ensure the operations of the University of Maryland, enrollment in daytime credit courses by active University of Maryland employees is subject to the consent of the appropriate director or department chairperson.

4. Employees from other University System of Maryland institutions shall be given the same opportunity for enrollment in courses on the College Park Campus under the tuition remission policy as their counterparts at UMD.
5. Tuition remission at other USM institutions shall be subject to the individual's admissibility to the institution and to the program in which the courses are to be taken, including other academic regulations of the institution governing student enrollment (for example, course prerequisites and registration deadlines).
6. The maximum number of hours of tuition remission available at UMD shall be determined by the Administration, based on budget constraints.

IV. CREDIT HOUR REMISSION ENTITLEMENTS

1. Full-time faculty, staff, and retirees from full-time positions shall be permitted to receive tuition remission for courses taken at UMD as follows:
 - 8 credits each for Fall and Spring semester
 - 4 credit for the standard Winter term and 6 credits for a 12-week Winter term
 - 8 credits combined total for Summer I and Summer II sessions.

Tuition remission for courses taken at other USM institutions will follow that institution's restrictions and guidelines.

2. Regular status part-time faculty and staff employed at least fifty percent (50%) of full-time or retirees from such part-time positions are permitted tuition remission for credits prorated to their percentage of time worked.
3. Faculty, staff, and retirees are responsible for payment of all mandatory fees.

V. PROCEDURE FOR REQUESTING TUITION REMISSION

1. All tuition remission applications for all USM institutions must be submitted through the online University System of Maryland Tuition Remission Application Portal. Portal access is available through the University Human Resources website.
2. Applications must be submitted no later than the published deadline for each semester or term.

VI. TUITION REIMBURSEMENT AT NON-USM OR NON-RECIPROCAL INSTITUTIONS

A. Eligibility for Tuition Reimbursement

Subject to the requirements of this Section, an eligible full-time employee may be reimbursed for the cost of tuition upon successful completion of a course offered by non-USM or non-Reciprocal two- or four-year institution if:

1. That employee's department head or chair determines that a specific course is job-related and will contribute to the employee's job performance.

2. The course is not available as a practical matter at any USM or reciprocal Institution; and
3. Operations and resources permit the employee's enrollment in and reimbursement for the course.

B. Administration of Tuition Reimbursement

1. The employee's department head or chair shall submit a written reimbursement recommendation to the UMD Chief Human Resources Officer (CHRO) before the first class meeting of the recommended course. The advance approval of the CHRO is required in order for the employee to receive reimbursement for the course.
2. The employee is responsible for paying tuition and related fees to the institution offering the approved course.
3. Upon successful completion of the course, the employee shall submit a request for reimbursement, documenting the tuition amount to be reimbursed and the employee's receipt of a grade of "C" or better in the course.

C. Limitations on Tuition Reimbursement

Tuition reimbursement for courses at non-USM or non-Reciprocal institutions is limited as follows:

1. The maximum reimbursement per semester shall be for one course, not to exceed four credit hours.
2. Course fees and expenses other than tuition are the responsibility of the employee.
3. An employee may not enroll in more than eight credit hours of coursework in a semester for which the employee is receiving a combination of tuition reimbursement under this Section and tuition remission under Section III of this policy.
4. The amount to be reimbursed per credit hour for an approved course may be limited to amount currently charged for a graduate credit hour at the University of Maryland, College Park.

D. Absence from Work to Attend Class.

1. If enrollment in a course is required by the employee's department, the employee may be absent from work for not more than one-half day on days when classes are scheduled. The employee will not be required to make up for time away from work on class days.
2. If enrollment in such a course is not mandatory, the employee should enroll in a class that meets during non-work hours, if feasible. The employee must either take leave or make up for any hours of work lost for a course that is not required by the employee's department.

VII-4.20(A) UNIVERSITY OF MARYLAND PROCEDURES CONCERNING TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF FACULTY AND STAFF

I. PURPOSE AND APPLICABILITY

The University of Maryland (UMD) supports the general policy of tuition remission for the spouses and dependent children of UMD Faculty and Exempt and Nonexempt Staff Employees on Regular or Retired Status, consistent with the University System of Maryland (USM) Board of Regents Policy VII-4.20 - POLICY ON TUITION REMISSION FOR SPOUSES AND DEPENDENT CHILDREN OF USM EMPLOYEES AND RETIREES

II. DEFINITIONS

For the purposes of this policy, the following definitions apply:

A. Dependent Child: The son/daughter, stepson/stepdaughter or legally adopted son/daughter of a UMD Employee or Retiree who:

1. Is under the age of 26 prior to the institution's deadline for registration for courses in the semester or term for which tuition remission has been requested, or,
2. If the child is 26 or older, is claimed as a dependent on the employee's federal income tax return for the year(s) in which tuition remission is granted.

B. Spouse: A person in a legally contracted marriage recognized by the State of Maryland to a UMD Employee or Retiree, with the exception of an estranged spouse who maintains a separate domicile.

C. Retiree: A former UMD Employee who:

1. Is receiving State of Maryland retirement checks and/or Optional Retirement Plan (ORP) periodic distribution, and
2. Was enrolled in a retirement plan prior to July 1, 2011 having earned at least five years' full time equivalent (FTE) of University System of Maryland service credit or was enrolled in a retirement plan July 1, 2011 or later having earned at least ten year's full time equivalent (FTE) of University System of Maryland service credit.

D. UMD Employee: A Faculty or Staff employee on Regular Status who works in a position that:

1. Has been approved through the budgetary and pertinent appointment classification processes; Is intended to last six months or more regardless of the nature of the source of funds or who has retired from such a position; and
2. Which may be on either a full-time basis or a part-time basis of at least 50% FTE.

III. ADMINISTRATION

This program shall be administered by the constituent institutions as follows:

A. General Eligibility.

Tuition remission is extended to the spouses and dependent children of all UMD Employees and Retirees, as defined above, on an equitable basis, subject to the requirements and limitations of this policy.

B. Scope of the Benefit.

1. Tuition remission for spouses and dependent children of UMD Employees that attend UMD and are enrolled in undergraduate programs is granted as follows:

- a. Unlimited remission for Fall and Spring semesters.
- b. 6 credits for Winter term.
- c. 8 credits combined total for Summer I and Summer II sessions.
- d. All differential tuition for undergraduate programs in Business, Computer Science, and Engineering

2. Tuition remission for spouses and dependent children of UMD Employees hired before January 1, 1990 that attend UMD and are enrolled in graduate programs is granted as follows:

- a. Unlimited remission for Fall and Spring semesters.
- b. 6 credits for Winter term.
- c. 8 credits combined total for Summer I and Summer II sessions.

3. Tuition remission for eligible spouses and dependent children of UMD Employees, as defined in Section IV of this policy, that attend other USM institutions and are enrolled in undergraduate or graduate programs, should consult with those institutions regarding the granting of tuition remission for those programs.

4. Tuition remission does not include mandatory fees or surcharges, which remain the responsibility of the individual student.

C. Academic Requirements

The availability of the benefit of tuition remission shall be subject to the individual's admissibility to the institution and to the program in which the courses are offered and to the other academic regulations governing student enrollment.

D. Part-time UMD Employees and Retirees

For spouses and dependent children of UMD Employees and Retirees who are employed in, or retired from a position at fifty percent or more time, the percentage of tuition remitted shall be proportional to the percentage of employment service.

E. Exempted Programs of Study.

1. Programs of study that are exempted from this benefit shall include:

- a. The M.D. and D.D.S. programs at the University of Maryland, Baltimore;
- b. Self-support programs and courses, unless the President of the institution has recommended and the Chancellor has approved, that the benefit be available for such a program.
- c. Other programs recommended for exemption, or limitation on the amount of tuition remission, by the President of the institution offering the program and approved by the Chancellor.

F. Application for Tuition Remission.

Each UMD Employee or Retiree seeking tuition remission for a spouse or dependent child shall complete an application through the University System of Maryland Tuition Remission Application Portal, with accompanying certification, that provides the information necessary to comply with both this policy and Internal Revenue Service regulations regarding the income tax law status of the tuition remission benefit requested by the Employee.

IV. LIMITATIONS BASED ON DATE OF EMPLOYMENT

A. Spouses and Dependent Children of UMD Employees and Retirees Whose Employment Began before January 1, 1990.

1. The Spouses and Dependent Children of UMD Employees and Retirees whose appointment was made or whose contractual arrangements were completed before January 1, 1990, may register for courses at any of the institutions of the USM, with 100% tuition remitted at both the undergraduate and graduate level, subject to the restrictions in this policy.

B. Spouses and Dependent Children of UMD Employees and Retirees Whose Employment Began on or after January 1, 1990 and before July 1, 1992.

Tuition remission benefits for such employees are provided as follows:

1. Applicable Programs and Courses Tuition remission is only available for courses and programs at the undergraduate level, and shall not apply to courses at the graduate or post-baccalaureate level.

2. Degree-Granting Institutions

- a. Spouses and dependent children of UMD Employees or Retirees may receive full tuition remission of one hundred percent (100 %) on courses toward a first undergraduate degree at UMD.
- b. Such spouses and dependent children may attend another institution of the USM to which the student has been accepted with 50% tuition remission. The remaining 50% of tuition cost is the responsibility of the individual student.

3. Special Circumstances and Limitations

a. Non-Degree Granting Institutions: Spouses and dependent children of USM Employees or Retirees from a non-degree granting institution may register for courses toward a first undergraduate degree at any institution of the USM with full (100%) tuition remission.

b. University of Maryland Extension (UME) and Agricultural Experimental Station (AES): Spouses and dependent children of the UME and the AES may receive full tuition remission toward a first undergraduate degree at any USM institution with full (100%) tuition remission.

C. Spouses and Dependent Children of USM Employees and Retirees Whose Employment Began on or after July 1, 1992

Tuition remission benefits for the spouses and dependent children of USM Employees and Retirees whose employment began on or after July 1, 1992 shall be available:

1. Consistent with the requirements and limitations in Paragraph IV.B, above, and
2. After the employee has been employed by UMD or USM for two years prior to the institution's deadline for registration in courses for the semester under consideration.

D. Effect of Break in Service

If a former UMD employee is rehired by a USM institution within three years of termination from prior UMD employment, the spouse and dependent children of the rehired employee shall be eligible for tuition remission, as provided in Section IV. A. through C. above, according to the employee's original UMD hire date.

E. Tuition Remission for Spouses and Dependents of Employees and Retirees that Reside Out-of-State.

Tuition remission charges to institutions and employees under this policy shall be at the in-state tuition rate, regardless of the state of residence of the eligible employee or retiree.

V. BENEFITS FOR SPOUSES AND DEPENDENT CHILDREN OF DECEASED UMD EMPLOYEES AND RETIREES

Subject to the requirements and limitations of this policy, spouses and dependent children of fulltime UMD Employees or Retirees who die in service or after retirement, shall be permitted to register for courses with tuition remission as follows:

A. Extent of Tuition Remission Benefits

The number of years of allowable tuition remission for an eligible spouse or dependent child is dependent on the years of USM service of the UMD Employees or Retiree, as follows:

1. One academic year, if the UMD Employee or Retiree was employed in the USM for less than three years;
2. Two academic years, if the length of employment was at least three but less than five years;
3. Three academic years, if the length of employment was at least five but less than seven years;

4. Four academic years, if the length of employment was at least seven but less than nine years; and
5. Five academic years, if the length of employment was nine years or more.

B. Other Eligibility Requirements

Eligibility for tuition remission shall continue:

1. For spouses, for a maximum period of seven years after the death of the UMD Employee or Retiree.
2. For children, as long as the child of a deceased UMD Employee or Retiree qualifies as a "Dependent Child" under Section II.A. of this policy.

C. Part-time Employees

For spouses and dependent children of part-time USM Employees or Retirees who are employed at fifty percent (50%) time or more and who die in service or after retirement, the percentage of tuition remission shall be proportional to the percentage of employment service averaged for the three years immediately preceding the employee's retirement or death.

VI. RECIPROCAL TUITION REMISSION FOR THE DEPENDENT CHILDREN OF UMD EMPLOYEES ATTENDING MORGAN STATE UNIVERSITY, SAINT MARY'S COLLEGE OF MARYLAND AND BALTIMORE CITY COMMUNITY COLLEGE

A. General Reciprocity

Dependent children of UMD employees may attend Morgan State University, Saint Mary's College of Maryland and Baltimore City Community College ("the Non-USM Institutions") and shall receive tuition remission at the same level of benefits as provided for dependent children of UMD Employees, subject to the definitions, requirements and limitations of this policy. However, the extent of the tuition remission benefit under this section is dependent upon full reciprocity being extended by the Non-USM Institution to dependent children of UMD Employees, and may be limited by the Chancellor or designee to align with any more restrictive requirements that may be established by the Non-USM Institution.

B. Retirees and Spouses

Tuition remission shall not be available to UMD Retirees or the spouses or dependents of UMD Retirees at Non-USM institutions.

VII. CONTINUED APPLICATION OF PRIOR POLICIES

This policy supersedes all prior policies and procedures related to tuition remission benefits for USM Employees and Retirees, except as follows:

A. Former Employees of Former USM Programs and Institutions

Special eligibility requirements for former employees and retirees of certain former USM programs shall remain in force as follows:

1. The USM former programs subject to this paragraph are: Maryland Institute for Agricultural and Natural Resources (MIANR), the Maryland Institute of Emergency Medical Services Systems (MIEMSS), and the University of Maryland Biotechnology Institute (UMBI).
2. Eligibility for tuition remission for the spouses and dependent children of the above programs is set out in documentation established at the time that the programs were restructured and maintained at the USM.