

**VALPARAISO UNIVERSITY
TUITION REMISSION/EXCHANGE PROGRAM**

1. TUITION REMISSION/EXCHANGE BENEFIT

The University provides tuition remission/exchange as an educational benefit for employees and their dependents as recognition of its commitment to higher education. Benefits are provided at the discretion of the University's Board of Directors and are subject to amendment or termination at the Board's discretion.

2. INITIAL EMPLOYEE ELIGIBILITY CRITERIA

For the purposes of the tuition remission/exchange program, initial eligibility is determined as any employee with a status of:

- full-time, or
- limited full-time, or
- retiree, as defined under section 7. a).

Limited part time and temporary/seasonal employees are not eligible for tuition remission or exchange.

Employees must meet the admission requirements of Valparaiso University.

3. REMISSION ELIGIBILITY

- a) Employees who meet the initial employee eligibility criteria described above qualify for full tuition remission.

- b) Scheduling of courses taken by the employee must be compatible with the employee's work schedule and University needs, and approved by the employee's supervisor or department head.

- c) An employee who received tuition remission as a dependent of their parent (an employee) prior to becoming an employee with the University will be eligible for tuition remission as long as the employee meets the initial employee eligible criteria as described above.

4. INITIAL DEPENDENT ELIGIBILITY CRITERIA

- a) Employee's dependents will be eligible for tuition remission as long as the employee has met the initial employee eligibility criteria, as outlined in item 2).
- b) Eligible dependents will be defined as:
 - i) Spouse: A person legally married to an eligible employee.
 - ii) Children: An unmarried child age 26 or under who is a son or daughter by birth, marriage, or adoption or have the eligible employee as their legal guardian and is considered as a dependent of the eligible employee for federal tax purposes. A dependent child of divorced parents is treated as the dependent of both parents regardless of which parent is claiming child on their tax return.
 - iii) Official and legal documentation as noted below will be required and must be uploaded to the application for tuition remission in order to substantiate relationship and dependent status:
 - (1) Child - birth certificate or most recent federal income tax return or proof of same residence in lieu of tax return.
 - (2) Spouse - marriage certificate
 - (3) Adopted child and child for whom employee is or has been legal guardian – legal documentation appointing guardianship and most recent federal income tax return.
 - (4) Stepchild – marriage certificate of employee **and** birth certificate of child; also, most recent federal income tax return or proof of same residence in lieu of tax return.
- c) Spouses and dependents must meet the admission requirements of Valparaiso University.
- d) High school students wishing to take one or two courses, and who are admitted to the University as a special student, including those enrolled in courses established for high school students, will be eligible for tuition remission on a space available basis. Space availability is determined by the Office of the Provost.

Note: For divorced parents, form 8332, "Release of Claim to Exemption for Child of Divorced or Separated Parents", or copy of tax return on which child is claimed/ proof of residence.

5. APPLICATION PROCEDURE

To apply for tuition remission, **all** of the following steps must be taken:

- a) Tuition Remission Application Form
 - i) Applications are available online here.
 - ii) Each person must complete tuition remission application form(s) as noted below:
 - (1) Full-time Undergraduate -
 - (a) Applicant must complete tuition remission application at the time of initial

enrollment.

- (b) Tuition remission will be renewed annually as long as applicant is continuously enrolled full-time. However, summer session enrollment requires the completion of a separate Summer Financial Aid Application. (Please see summer session requirements below.)
- (c) If applicant reduces course load below full-time, or if applicant drops out of school, or if tuition remission is terminated due to failure to meet eligibility criteria (as per section 6. of this policy), a new tuition remission application must be submitted when preparing to re-enroll.

(2) Graduate and Part-time Undergraduate –

- (d) Applicant must complete tuition remission application per academic year (if enrollment plans for the fall/spring academic year are known) or per semester or summer session (if enrollment plans for subsequent semesters are unknown). Please see additional summer session requirements below.
- (e) A part-time undergraduate student is defined as a student who is enrolled for less than twelve (12) credit hours.

b) Summer Session Requirement

All students wishing to use tuition remission for summer courses must complete a separate Tuition Remission Application for summer.

e) Filing Dates

- i) Tuition Remission Application Forms must be completed and submitted to the Office of Human Resource Services no later than the first day of classes for the semester/term or academic year for which you are applying.
- f) Tuition remission will be prorated for any application turned in after the first day of classes for the semester/term or academic year for which you are applying. “Free Application for Federal Student Aid” (FAFSA) Form (optional).
 - i) Undergraduate students working on their 1st Bachelor’s Degree are encouraged to file the Free Application for Federal Student Aid (FAFSA). If you would qualify for a Federal Pell grant, you could receive those funds in addition to tuition remission. If you would qualify for Indiana State grants, those awards could be applied toward the general fee charge.
 - ii) FAFSA forms are available online at www.studentaid.gov.

6. ONGOING ELIGIBILITY CRITERIA

a) Academic

Students must meet the Standards of Satisfactory Progress. Policy specifics are found at: <http://www.valpo.edu/financialaid/scholarships/sap.php>. Those not meeting this criterion will lose their tuition remission until they meet the requirements.

b) Employment

If an employee resigns or is terminated during the course of a semester, the employee and/or eligible dependents will receive tuition remission for the remainder of the current semester. Upon completion of those courses, they will lose eligibility for tuition remission.

c) Marital

If an employee is divorced during the course of a semester, the employee's former spouse will receive tuition remission for the remainder of the current semester. Upon completion of those courses, they will lose eligibility for tuition remission. It is the responsibility of the employee to notify the Office of Human Resource Services of a status change.

d) Dependent Child

Dependent children who reach the age of 26 during the course of a semester will continue to receive tuition remission only for the remainder of the current semester. Upon completion of those courses, they will lose eligibility for tuition remission. It is the responsibility of the employee to notify the Office of Human Resource Services of a status change.

7. RETIREMENT

a) Upon the retirement of an employee, the employee, the spouse and dependent children will continue to receive tuition remission. An eligible retiree is a person who is eligible to receive retirement income pursuant to the employer's retirement plan or social security and whose service record reflects one of the following:

- i) 15 years of qualifying service as defined by item 2 of this policy, or
- ii) 60 years of age or older and has completed at least 10 years of full-time service, or
- iii) age plus full-time service completed is greater than or equal to 85.

b) Tuition remission will only be granted to those who are eligible dependents at the time of retirement as defined in item 4b).

8. DEATH

Upon the death of an employee, his/her spouse and dependent children as defined under eligibility criteria will continue to be eligible for tuition remission and tuition exchange if the employee had met the eligibility criteria at the time of death. Eligible dependents must enroll within five years of date of death.

9. LIMITS AND EXCLUSIONS

a) Tuition remission applies only to the University's tuition charge. Any other charges are specifically excluded. Examples of excluded items are: general fee, overload and on-line fees, performance music, engineering fee, room, meal plan, books, etc. However, the general fee will be waived for all university employees who are taking courses for which they have tuition remission.

b) Tuition remission applies only to courses taken for academic credit, including summer, overseas, and urban center courses. Courses taken on an audit basis are excluded due to federal tax regulations.

c) The limits of Undergraduate tuition remission are determined as follows:

- i) A single recipient's full tuition remission is limited to 8 semesters or 140 hours, whichever is longer. This limitation includes courses taken as "special high school"

students.

- ii) If a student who has attended another institution under tuition exchange wishes to enroll at Valparaiso University utilizing the tuition remission benefit, they will be eligible for a total of 8 semesters or 140 credit hours, whichever is longer, for tuition remission/tuition exchange including those semesters attended at the other institution.

In addition to the tuition exchange benefit, a tuition exchange student may enroll in summer sessions at Valparaiso University utilizing tuition remission.

- iii) The following Undergraduate programs are excluded from this policy:

- (1) Health Science

- iv) Graduate courses are covered by this policy; however,

- (1) Employees may use tuition remission toward Graduate courses and receive 100% tuition remission.

- (2) Dependents, including spouses, are limited to 50% tuition remission toward graduate courses.

- (3) The tuition remission benefit for courses in the MBA program is further limited to space availability. Space availability is determined by the Office of the Provost.

- (4) The following Graduate programs are excluded from tuition remission:

- (a) Physician's Assistant Program

- (b) Public Health Online Program (Masters)

- (c) Health Administration Online Program (Masters)

- (d) Occupational Therapy Programs (Masters and Doctorate)

- (5) Graduate level tuition remission for dependents is taxable to the employee. The benefit is added to the employee's compensation for tax purposes twice a year and the appropriate taxes will be deducted from the employee's pay. The University strongly suggests that employees consult with their tax advisor and/or the Payroll Office. Please see [Taxability for Graduate TR/TE](#)

10. DETERMINATION OF TUITION REMISSION AMOUNT

- a) The following process will be used to determine the amount of tuition remission for which a student is eligible.
 - i) Students receiving no other scholarship or grant aid will receive the amount of their tuition assessment.
 - ii) All Valpo aid will be totaled and first applied towards the student's tuition assessment. This aid can include, but is not limited to:
 - (1) VU Scholarships
 - (2) Athletic Scholarships

- (3) Endowed Scholarships
- (4) VU National Merit Scholarship

The only exception to this will be if an award has been specifically designated by the awarding body to be used for an assessment other than tuition.

- ii) After the total of a student's other financial aid is applied to the tuition assessment, any outstanding balance in the tuition assessment will be paid for via tuition remission.
- iii) If a student is receiving Indiana state grant funds, the total of the state funds cannot exceed the general fee amount.
- iv) Outside scholarships are not part of the tuition remission calculation, and they may be used to fund other educational costs. However, the total of all outside aid plus tuition remission and other financial aid, including federal grants, may not exceed the total Cost of Attendance.

11. TUITION EXCHANGE PROGRAM

Valparaiso University is a member of Tuition Exchange (TE), an association of colleges and universities that subscribe to a program of reciprocal remission of tuition charges. Eligible employees and their dependents can view a list of participating institutions at <http://tuitionexchange.org>.

a) Eligibility

- (1) Employee and dependent eligibility criteria for TE are identical to those for tuition remission.

b) Tuition Exchange is available for use towards undergraduate programs for up to 8 semesters and 4 semesters for graduate programs. Please visit the Tuition Exchange website for details at <http://tuitionexchange.org>.

- (1) Exclusions to TE are as follows:

- i. Health Science (undergraduate)
- ii. Occupational Therapy Programs (undergraduate)
- iii. Physician Assistant Programs (Masters)
- iv. Public Health Online Program (Masters)
- v. Health Administration Online Program (Masters)

c) Tuition exchange applications are available online at <http://tuitionexchange.org>. TE applications open July 1 of the prior year to enrollment. (i.e. Open July 1, 2024 for Fall 2025 start)

d) You may list all schools to which the student is applying on one TE Application Form.

e) Please note the following process:

- Financial Aid will process the TE applications electronically to the Tuition Exchange office, beginning October 1.

- The TE application is separate from the application for admission. We suggest that the student apply for admission concurrently with completing the TE application. Families should also check with the schools to which the student is applying for deadlines, if any, for both TE and admission applications.
 - The institution to which the student is applying for TE will notify the student and the Financial Aid Office of acceptance or denial of the TE application.
 - Recertification for continuing students will be submitted electronically each year beginning February 15. It is not necessary to reapply for TE unless changing institutions. In the case of changing schools a new TE application must be submitted online for the new school.
 - Importing schools will review all applications no later than April 1, although decisions may be offered prior to that date.
- f) The employee must remain employed and meet eligibility requirements to continue receiving tuition exchange for themselves and/or dependents. However, the TE award will be renewed each year at the discretion of the awarding institution. Some institutions limit the program availability.
- g) Applicants are strongly encouraged to contact the universities at which they are applying for Tuition Exchange for information regarding:
- Confirmation of their status as participating institutions.
 - Application deadlines.
 - Specific institutional eligibility requirements and procedures.
 - Number of opportunities available under the plan.