



University of Utah Human Resource Management

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MEMORANDUM

TO: Academic Senate
FROM: Wendy Poppleton, Director of Benefits
DATE: August 14, 2023
RE: Proposed Amendment to Rule 5-305A, Scope, Eligibility, and Limitations for Reduced Tuition Programs

On May 18, 2023, the Board of Trustees of the Utah System of Higher Education (USHE) amended USHE Policy [R824, Tuition Remission Benefits](#) to state that tuition benefits for employees of Higher Education Institutions in the State of Utah may only apply to undergraduate tuition unless the institution specifically identifies programs for which additional waivers may apply. In accordance with [Utah Code 53B-8-101](#), the USHE Board has the authority to “establish the amount or percentage of tuition that an institution of higher education may waive”. As a result, the Reduced Tuition Policy of the University of Utah is required to comply with USHE policy.

The university desires to amend [Policy 5-305, Reduced Tuition Programs](#), as well as the accompanying rule, to allow for additional tuition waivers for eligible university employees.

To give current employees time to plan for their own education and the education of their eligible family members, the university will continue the current tuition reduction practice through the Summer 2024 semester.

Effective with the Fall 2024 semester, the employee tuition benefit will apply to base undergraduate tuition, base graduate tuition, and undergraduate differential tuition. Employee tuition benefits for graduate program differential tuition (currently added by approximately 30 graduate-level programs) will phase out over the next academic year, ending with the Spring 2024 semester.

Students who are employees or the eligible family member of an employee who are graduate students during the Spring 2024 and/or Summer 2024 semesters, have a legacy benefit to continue receiving the reduction on graduate-level differential tuition for up to seven years as long as the following criteria are met:

- The employee remains in a position eligible for tuition reduction benefits with the university.
- The student is enrolled continuously (fall and spring semesters) in the same degree program.
- The employee applies for the reduced tuition benefit each semester (including semesters where a scholarship may cover the entire cost of tuition).

In the event there is a semester prior to the Fall 2031 semester where all three criteria are not met, the student will lose legacy status. In the event the student is unable to attend a semester because of a serious health condition, the employee may apply for a waiver of the second bullet for that semester. In no event will a student retain legacy status past the Summer 2031 semester.

Proposed University of Utah Regulation Revision

General Regulation Information	
Regulation proposed for enactment/revision	Rule R5-305A: Scope, Eligibility, and Limitations for Reduced Tuition Programs
Policy owner(s)	Human Resources Director of Benefits
Policy officer(s)	Chief Human Resources Officer
Contact person(s)	Wendy Poppleton
Other related regulations with proposed revisions	None
Planned effective date of revisions	Upon presentation to Academic Senate Executive Committee, or if determined to be academically significant, upon presentation to the Academic Senate.
Brief (1-2 sentence) description of revisions and reason for revision	Amends the employee tuition benefit program to comply with changes to Utah Board of Higher Education Policy R824: Tuition Remission Benefits. Also, expands eligibility for the tuition benefit program to married dependent children of University employees.

Consultation and Approval	
Groups and Stakeholders Consulted	
Required Approval Steps and Date (if applicable)	
Council of Academic Deans (if applicable)	Not applicable
Institutional Policy Committee	
Academic Senate Executive Committee	
Vice President or Designee	
Academic Senate (if applicable)	
Board of Trustees (if applicable)	

Rule R5-305A: Scope, Eligibility, and Limitations for Reduced Tuition Programs

Revision ~~01~~. Effective date: ~~June 1, 2009~~ [Planned for August, 2023](#)

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I. Purpose and Scope

A. Purpose.

To implement University Policy 5-305 and outline the scope, eligibility and limitation rules for tuition and fee reduction programs available as a benefit for University Employees and their dependents, dependents of deceased University employees, University Emeriti and Retirees, and senior citizens.

B. Scope.

~~reserved~~

[This rule applies to all University Employees, including University of Utah academic campus employees, University of Utah Health academic employees, and University of Utah Health hospitals and clinics employees.](#)

II. Definitions

The definitions provided in Policy 5-305 apply for this rule. In addition, the terms below apply for the limited purpose of this rule.

- A. Domestic Partner and Domestic Partnership have the same meaning as the terms are defined in Policy 5-200.

III. Rule

A. Scope of Authorized Tuition and Fee Benefits

1. General Rules. For purposes of Policy 5-305 and this Rule, unless otherwise specified, no distinction is made between credit courses, noncredit courses, workshops, or courses taken on an audit basis. Some classes administered by Academic Outreach and Continuing Education may require approval of the Continuing Education Program Director. Reduced tuition and fee benefits are available pursuant to the conditions specified herein to the extent that class enrollment space is available.
2. Basic Benefits. Except as otherwise provided herein, persons who are eligible for benefits under Policy 5-305 and this Rule shall be entitled to a reduction in ~~total charges, inclusive of~~authorized tuition and student fees ~~(except for Special Fees described in III.A.3. below)~~, amounting to 50% of the approved resident or nonresident rate applicable to the individual and to the course load for which the individual is registered. Tuition and student fees authorized for reduction under Policy 5-305 and this Rule include base tuition on undergraduate and graduate courses, differential tuition charges on undergraduate courses, and mandatory student fees (except for Special Fees described in III.A.3. below); and for a semester prior to Fall 2024, differential tuition charges on graduate courses.
 - a. A graduate student who remains continuously enrolled in a degree program for which the student received a tuition benefit of a reduction on graduate differential tuition prior to Fall 2024 may continue to receive a

[reduction on graduate differential tuition in Fall 2024 and after, subject to limitations established by the Chief Human Resources Officer.](#)

3. Special Fees. Special program, laboratory, individual instruction charges, and consumable material fees (see Policy 6-406) are not included within the authorized tuition and student fee reductions provided by Policy ~~5-305~~ and 5-305 and this Rule. Such special fees and charges include but are not limited to:
 - a. Special laboratory fees
 - b. Ph.D. language classes
 - c. Correspondence study
 - d. Noncredit workshops
 - e. Special programs
 - f. Institutes
 - g. Conferences
 - h. Special fees for instructional materials
 - i. Special fees for field trips
 - j. Private music fees
- B. University Employees and their dependents may receive reductions in charges for authorized tuition and fees for University courses subject to the following eligibility and limitation rules:
 1. University Employees
 - a. Eligibility. The following University Employees are eligible for reduced authorized tuition and fees, as provided herein, when enrolled in University courses:

- i. Employees in Benefit Eligible positions (see Policy 5-308), employed on a full-time basis (.75 FTE or greater).
- ii. Employees holding appointments as teaching fellows/assistants may be granted 100 percent reduction in [authorized](#) tuition and fees (except for Special Fees described in III.A.3. above), and shall be entitled to a student activity card, subject to limitations prescribed by the cognizant vice president.

b. Limitations

- i. Employees in benefit-eligible positions are eligible for reduced tuition and fee benefits under Policy 5-305 and this Rule only after the conclusion of six consecutive months of full-time employment with the University immediately prior to the semester in which the course work is to be taken.
- ii. Employees or their spouses, or Domestic Partners, and dependents eligible for this benefit and holding appointments as graduate assistants, teaching assistants, research assistants, or graduate fellows may receive a combined reduced tuition benefit not to exceed 100 percent. All other recipients of this benefit (except Emeriti and their spouses or Domestic Partners) may not receive a combined reduced tuition benefit that exceeds 50 percent under Policy 5-305 and this Rule.
- iii. Employees taking classes during scheduled working hours must have the approval of the cognizant supervisor, and, except where class attendance has been approved as a training program within the individual employee's working assignment, must arrange with the supervisor to make up such time on a regularly scheduled basis.

2. Employee Dependents

- a. Eligibility. An eligible Employee's spouse is eligible for the benefits authorized by Policy 5-305 and this Rule subject to the limitations in paragraphs b(i) and b(vi) below and the eligibility requirements of Section B.1 above. An eligible employee's Domestic Partner is eligible for the benefits authorized by Policy 5-305 and this Rule subject to the limitations in paragraphs b(ii) and b(vi) below and the eligibility requirements of Section B.1 above. The ~~unmarried~~ dependent children of an eligible Employee or an eligible employee's spouse or Domestic Partner are eligible for the benefits authorized by Policy 5-305 and this Rule subject to the limitations in paragraphs b(iii) through b(vii) below and the eligibility requirements of Section B.1 above.
- b. Limitations
 - i. The spouse of an Employee may receive reduced tuition and fee benefits under Policy 5-305 and this Rule only if the Employee's consecutive full-time service with the University totals one or more years prior to the semester in which the course work is to be taken.
 - ii. The Domestic Partner of an Employee may receive reduced tuition and fee benefits under Policy 5-305 and this Rule only if the Employee's consecutive full-time service with the University totals one or more years prior to the semester in which the course work is to be taken. The Employee will be required to certify that a Domestic Partnership meeting the University's eligibility requirements exists prior to the semester in which the course work is to be taken.
 - iii. The ~~unmarried~~ dependent children of an employee or an Employee's spouse or Domestic Partner may receive reduced tuition and fee benefits under Policy 5-305 and this Rule only if the Employee's consecutive service with the University totals three or more years prior to the semester in which the course work is to be taken.

- iv. The reduced tuition and fee benefits provided in Policy 5-305 and this Rule for ~~an-unmarried~~a dependent child shall not extend to course work commencing after the date upon which the dependent child reaches 26 years of age.
 - v. The reduced tuition and fee benefits provided in Policy 5-305 and this Rule for ~~an-unmarried~~a dependent child shall not extend to enrollment in Continuing Education non-credit courses.
 - vi. An eligible Employee, who is also the spouse, Domestic Partner, or ~~unmarried~~-dependent child of an Employee, may claim reduced tuition and fee benefits in either capacity, subject to any applicable limitations specified herein.
 - vii. If more than one parent of ~~an-unmarried~~a dependent child under age 26 is employed at the University, the dependent child may receive reduced tuition and fee benefits under Policy 5-305 and this Rule as the dependent of only one eligible Employee.
- C. University Retirees (including those who retired on disability), University Emeriti, and Dependents of Emeriti, Retired or Deceased University Employees may receive reductions in charges for authorized tuition and fees for University courses subject to the following eligibility and limitation rules:
- 1. University Retirees (including those who retired on disability) and Dependents of Retirees.
 - a. The Retiree must have completed five or more years of continuous service and met the eligibility requirements in Section B.1 above immediately prior to retirement. The Retiree may receive reduced tuition and fees as provided in Policy 5-305 and this Rule, subject to the limitations provided herein.

- b. A Retiree's spouse or Domestic Partner may receive reduced tuition and fees as provided in Policy 5-305 and this Rule, subject to the limitations provided herein.
 - c. The ~~unmarried~~ dependent children (under age 26) of a Retiree, a Retiree's spouse or a Retiree's Domestic Partner may receive reduced tuition and fees as provided in Policy 5-305 and this Rule, subject to the limitations provided herein and the University's Domestic Partnership certification requirements.
 2. Dependents of Deceased University Employees. The spouse or Domestic Partner of a deceased University Employee and, the ~~unmarried~~ dependent children (under age 26) of a deceased University Employee, or of the deceased Employee's spouse or Domestic Partner, may receive reduced tuition and fee benefits under Policy 5-305 and this Rule, provided that the deceased employee met the eligibility requirements in Section B.1 above at the time of his/her death. For benefits based on a domestic partnership, the certification of the domestic partnership must have been completed prior to the Employee's death.
 3. University Emeriti. University Emeriti and their spouses or Domestic Partners are exempt from payment of authorized tuition and fees, subject to the limitations provided herein (except for Special Fees described in III.A.3. above). This benefit is also extended to surviving spouses and Domestic Partners of deceased Emeriti, subject to the limitations and requirements stated herein.
- D. Utah senior citizens may receive reductions in charges for authorized tuition and fees for or audit University courses subject to the eligibility and limitation rules provided herein and in Utah Code Annotated 53B-9-101 to -103.
 1. Utah residents who are 62 years of age or older are entitled to enroll on an audit basis in classes for which they may be qualified, subject to availability

of space, without payment of tuition or student fees (except for Special Fees described in III.A.3. above).

2. Minimum enrollment fees approved by the ~~Board of Regents~~ [Utah Board of Higher Education](#) will be charged to senior citizens who enroll under this program. An appropriate identification card will be issued which will admit the holder to classes designated as available to senior citizens, but will not provide other privileges.
3. Individuals who are eligible for tuition reduction benefits under Policy 5-305 Section III.A (University employees and dependents) may elect to enroll as senior citizens if they are otherwise qualified to do so; provided that classes so taken during scheduled working hours by eligible University employees are subject to the provisions of paragraph B.1(b)(iii) of this Rule.

IV. Procedures and Forms

- A. An Application for Reduced Tuition is available for use by eligible employees and Retirees to request authorized reduced tuition and fees benefits for themselves or other eligible individuals. Copies may be obtained from the University Benefits Department, University Hospital Employee Service Center, or on the internet at www.hr.utah.edu.
- B. The Teaching Fellow/Teaching Assistant Tuition Reduction Card should be used to document eligibility for tuition benefits for teaching fellows/assistants. Cards may be obtained from departmental offices.
- C. Forms and procedures for enrollment of senior citizens will be provided, and senior citizen enrollments will be administered, by Academic Outreach and Continuing Education.

Sections V- VIII are for user information and are not subject to the approval of the Academic Senate or the Board of Trustees. The Institutional Policy Committee, the Policy Owner, or the Policy Officer may update these sections at any time.

V. Policies/ Rules, Procedures, Guidelines, Forms and other Related Resources

A. Policies/ Rules.

1. Policy 5-305

B. Procedures, Guidelines, and Forms. [*reserved*]

C. Other Related Resources. [*reserved*]

VI. References

A. Policy 5-011: Personnel Definitions

B. Policy 5-112: Retirement

C. Policy 5-308: Benefits Eligibility Chart

D. Policy 6-406: Special Student Fees

E. [Utah Board of Higher Education Policy R824: Tuition Remissions Benefits](#)

F. Utah Code Title 53B, Chapter 9, Higher Education for Senior Citizens

VII. Contacts

The designated contact officials for this Regulation are

A. Policy Owner(s) (primary contact person for questions and advice): Director of Benefits

B. Policy Officer(s): Chief Human Resources Officer

See Rule 1-001 for information about the roles and authority of policy owners and policy officers.

VIII. History

Revision History.

A. Current version. Revision ~~0~~1.

1. Approved by –~~Interim~~ Vice President for Human Resources, ~~June 1, 2009.~~
~~Approved by the~~[\[Date\]](#). [\[interest\]](#) Academic Senate ~~June 1, 2009,~~ with
~~effective date of July 1, 2009.~~ [information\]](#)
2. Legislative History
 3. ~~Editorial Revisions~~
 - a. ~~Editorially revised [date] to move to current regulations template.~~
 - b. ~~Editorially revised October 11, 2011 to reflect the changes in employee definitions as prescribed in Policy 5-001.~~
- B. Previous versions.
 1. [Revision 0. Effective Date July 1, 2009](#)
- C. Renumbering
 1. Not applicable

Summary report: Litera Compare for Word 11.2.0.54 Document comparison done on 7/18/2023 11:23:12 AM	
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Original filename: r5-305a.r0.docx	
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Changes:	
<u>Add</u>	23
Delete	24
Move From	0
<u>Move To</u>	0
<u>Table Insert</u>	0
Table Delete	0
<u>Table moves to</u>	0
Table moves from	0
Embedded Graphics (Visio, ChemDraw, Images etc.)	0
Embedded Excel	0
Format changes	0
Total Changes:	47