

VANDERBILT UNIVERSITY AND MEDICAL CENTER

HUMAN RESOURCES POLICIES AND PROCEDURES

SUBJECT: EDUCATION ASSISTANCE PROGRAMS

POLICY #: HR-013

EFFECTIVE DATE: July 1, 1999

(Revision Date January 1, 2003- changes noted in Red)

POLICY

The purpose of this policy is to outline the tuition benefits for regular or term full-time staff, their spouses or domestic partners, and their dependent children to further personal development and life-time learning.

PROCEDURE

I. DEFINITIONS

- A. **Full-time staff** are any regular staff working 30 hours or more per week.
- B. **Spouse** is used here to mean anyone legally married to a staff member or anyone certified as a same sex domestic partner (See "Domestic Partner Benefit Policy").
- C. **Term Staff** are any staff working in positions identified as "term positions" in the "Recruiting and Hiring Policy").
- D. **Accredited Institution** is an institution as accredited in the Directory of Higher Education and offering academic courses toward an associate, baccalaureate, or post-graduate degree.

II. ELIGIBILITY

- A. **STAFF/SPOUSE:** Educational benefits are available for Staff members and their spouses provided: (1) the staff member is employed full-time in a regular or term position, and (2) the staff member has been in such a position for three months before course registration.
- B. **CHILDREN:** Educational benefits are available for the Staff member's dependent children when the staff member is at least twenty-one (21) years old and he/she has been employed full-time for the past five continuous years in a regular or term position at Vanderbilt (or any other accredited college or university, with no break-in-service greater than three (3) continuous months duration). The benefit begins the semester following five years of

continuous service.

The children of a staff member whose service is terminated due to permanent disability or death may be eligible to receive the tuition benefit. The staff member must have met the full-time five-year service requirement, and the dependents must enter an accredited institution within five years of the disability or death.

Note: Vanderbilt temporary staff members are not eligible for this benefit.

III. PROCESS:

Educational Benefits are divided into three categories, depending on who is using the benefit:

BENEFIT IS FOR THE STAFF MEMBER:

Vanderbilt will assist with paying tuition for undergraduate, graduate, or professional courses for staff as follows:

- Staff must be eligible for the benefit and enrolled in an accredited institution as defined in section II of this document
- Financial assistance is provided for one course per semester, or three courses per academic year
- Upon satisfactory completion of the course at another college or university, Vanderbilt will reimburse eligible staff 70% of the charge for tuition, up to an amount equal to 70% of what Vanderbilt would charge for similar level coursework.
- For course work at Vanderbilt, a 70% discount will be applied to Vanderbilt charges for tuition upon registration.
- Fees, books, the remaining amount of tuition, etc., are the responsibility of the staff member
- Staff members who apply to Vanderbilt for coursework are subject to the same competition for admission as other applicants.

In addition to the benefits outlined above, eligible staff members may audit one Vanderbilt course per semester and tuition will be waived, provided the staff member has the instructor's and the supervisor's written permission to attend. No credit is given for audited classes.

BENEFIT IS FOR THE SPOUSE:

Vanderbilt will assist with paying tuition for undergraduate, graduate, or professional courses for the staff member's spouse to attend Vanderbilt as follows:

- Staff must be eligible for the benefit as defined in section II of this document
- Spouse must be accepted at Vanderbilt under the normal competitive admissions process
- Financial assistance is provided for one course per semester, or three courses per academic year, provided coursework is not in pursuit of a degree and the spouse is not enrolled in a full-time program
- Vanderbilt will credit the spouses account for 47% of the charge for tuition for one course per semester.
- Fees, books, the remaining amount of tuition, etc., are the responsibility of the spouse and staff member.

In addition to the benefits outlined above, spouses of eligible staff members may audit one Vanderbilt course per semester and tuition will be waived, provided that the spouse has the instructor's written permission to attend.

BENEFIT IS FOR DEPENDENT CHILDREN:

Vanderbilt will assist with paying tuition for undergraduate courses for the staff member's dependent children as follows:

- Staff must be eligible for the benefit and enrolled in an accredited institution as defined in section II of this document
- The child must meet the IRS 5-part dependency test (see Q & A)
- The child must be enrolled in undergraduate courses, leading to the student's first baccalaureate degree.
- Vanderbilt will pay the college or university that the child attends 70% of the charge for tuition, up to an amount equal to 70% of what Vanderbilt would charge for similar level coursework. If the child attends an institution where the tuition is below \$2,000, then Vanderbilt will pay 100% of the tuition amount. Where the tuition falls between \$2,000 and \$2,857, Vanderbilt will pay \$2,000 toward the tuition.
- Each eligible dependent child may receive tuition assistance for up to 8 academic semesters or 12 academic quarter of undergraduate courses.
- The maximum family tuition benefit is 24 semesters or 36 quarters for all of the staff member's children; or a maximum of 48 semesters or 72 quarters for all of the children if Vanderbilt employs the staff member and his/her spouse.
- Fees, books, room and board, the remaining amount of tuition, etc., are the responsibility of the staff member.

- Dependent children who apply to Vanderbilt are subject to the same competition for admission as other applicants.

GENERAL INFORMATION

Forms to apply for educational tuition assistance are available at <http://hr.vanderbilt.edu/forms/index.htm>. To receive educational assistance for a dependent child's tuition the forms must be filed two months in advance of the beginning of classes in order for Vanderbilt to properly process payments. Forms for staff members or their spouses to attend classes must be filed prior to class registration.

Tax laws are subject to change and it is strongly recommended you consult with your tax adviser to determine if the educational assistance benefit is taxable income to you.

See Q&A for further clarification and examples.

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Other Related Links:

Frequently Asked Questions

- [FAQ Tuition Benefit for My Child](#)
- [FAQ Tuition Benefit for Myself, or My Spouse/Partner](#)

[View Previous Version\(s\) of this Policy](#)

[Educational Assistance Forms](#)

For more information on Tuition Assistance, [Click Here](#).