

**AUSTIN PEAY STATE UNIVERSITY  
POLICIES AND PROCEDURES MANUAL**

Policy Number: 5:001	Supersedes Policy Number: 5:001
Date: September 17, 2009	Dated: February 24, 2009
Subject: Faculty and Staff Support for Educational Expenses	Mandatory Review Date: September 17, 2014
Initiating Authority: Vice President for Finance and Administration	TBR Policy/Guideline Reference: <a href="#">P-130</a>
Approved:	President: signature on file

Austin Peay State University is committed to the continued professional growth and development of faculty and staff. Support for educational assistance of personnel and their dependents is an important vehicle for addressing that need. These programs are active subject to the availability of funds. **Austin Peay follows the procedures documented in TBR Guideline P-130 in implementing the following programs except for credit hour limits.**

[http://www.tbr.state.tn.us/policies\\_guidelines/personnel\\_guidelines/P-130.htm](http://www.tbr.state.tn.us/policies_guidelines/personnel_guidelines/P-130.htm).

- (1) Faculty or Administrative/Professional Staff Grant-in-Aid Program
- (2) Faculty or Administrative/Professional Staff Tuition or Maintenance Fee Reimbursement Program
- (3) Employee Audit Program/Non-Credit Program
- (4) Clerical and Support Staff Maintenance Fee Reimbursement Program
- (5) Faculty, Administrators, and Support Staff Fees Waiver at any Tennessee Public Post Secondary Institution (PC 191)
- (6) Student Fee Discount for Spouse and Dependent Children of Employees
- (7) Employees Age 65 and Above
- (8) Diversity Enhancement Programs
- (9) Public Higher Education Fee Waiver for State Employees
- (10) Fee Discount for Dependent Children of Licensed Public School Teachers or State Employees

## Application Forms

Application forms for educational programs may be obtained online at [www.apsu.edu/hrhomepage/forms.htm](http://www.apsu.edu/hrhomepage/forms.htm) or from the APSU Human Resources Office except where noted.

Current APSU employees may participate in programs 1-8.

APSU retirees may participate in programs 2, 3, 4, 6 and 7.

Personnel assigned to APSU by agreement of the military are eligible to participate in programs 3, 4, 5, 6 and 7.

State employees can participate in programs 3, 7 and 9. Forms must be obtained through the office/department where the employee works.

Eligible dependents of licensed public school teachers or state employees are eligible to participate in program 10 only. Forms for this program must be obtained through the office/department where the employee works.

## Taxation of Educational Assistance Program

Undergraduate course tuition paid by Austin Peay State University for its employees is eligible for exclusion from the employee's gross annual income in accordance with Internal Revenue Code (IRC) Section 117 (d). For graduate courses that began after Jan. 1, 2002, the first \$5,250 of eligible expenses in a calendar year can be excluded under IRC Section 127. Additional expenses paid by the University exceeding that amount will be included in the employee's income as wages. The only exception for excluding these excess payments from income is for a course that qualifies as "work-related."

Graduate courses are considered work-related if the education:

- a. maintains or improves skills required by the individual in his/her employment; or
- b. meets the express requirements of the individual's employer, or the requirement of applicable law or regulations, imposed as a condition to retain the present position or salary.

However, even if the education meets the requirements listed above, the education expenditures are not considered work-related if the education:

- a. is required to meet the minimum education requirements for qualification in his/her employment; or
- b. qualifies the individual in a new trade or business.

If the supervisor is not sure if the graduate course is work-related, the supervisor should discuss with staff in the Human Resources Office.

#### Current Employees Taking Classes during Work Hours

To restrict the time spent in class during the workday, employees of the University will be limited to one three (3) hour class, during regular work hours.

In addition to the information in TBR Guideline P-130, the following institutional requirements are included specifically for Austin Peay State University.

(1) **FACULTY OR ADMINISTRATIVE/PROFESSIONAL STAFF GRANT-IN-AID PROGRAM**

##### Deadline for Submission

Requests for grants-in-aid shall be submitted (using the form obtained from the Human Resources Office) to the president for approval no later than March 1 for the ensuing year. After approval, the institution may issue and execute the contract following with the conditions under which the grant-in-aid is awarded. A copy of the executed contract shall be completed prior to June 30 of the same calendar year.

Priorities for award of grant-in-aids are established in Section I, paragraph A. of TBR Guideline P-130. In addition to the eligibility and priorities established in the TBR guideline, the following priorities will be used by Austin Peay State University in making award decisions:

1. Students taking classes at Austin Peay State University
2. Students taking classes at another TBR or UT institution
3. Students taking classes at other regionally accredited colleges and universities.

(2) **FACULTY/ADMINISTRATIVE/PROFESSIONAL STAFF TUITION OR MAINTENANCE FEE REIMBURSEMENT PROGRAM**

An employee shall not be eligible for the provisions of this program unless he/she has used the "Fee Waiver for TBR/UT System Employees - PC-191." See section 5.

##### Level of Support

Payment by APSU will be no greater than the established Tennessee Board of Regents maintenance or tuition related fees for a three (3) credit hour course. Tuition-related fees might include maintenance fees, tuition, debt service fees, technology access fees, on-line

fees, services charges and incidental fees payable at registration. The employee will be responsible for application fee and required deposits.

#### Main Campus Credit Hour Limit

It is the intent of the APSU Faculty/Administrative/Professional Staff Tuition or Maintenance Fee Reimbursement Program that employees normally will be eligible for three (3) credit hours per term, which is defined as a traditional length academic semester; however, the structure of the academic calendar in the summer may permit an employee to be eligible for (6) credit hours; three credit hours during each of Summer 1 and Summer 2 or three credit hours for full Summer.

#### Fort Campbell Credit Hour Limit

Employees will be eligible for three (3) credit hours per Fort Campbell term, defined as Fall 1, Fall 2, Spring 1, Spring 2 and Summer 3; three credit hours per term with a limit of four terms per academic year.

An employee cannot use the Maintenance Fee Reimbursement Program for both FCC and main campus courses if the terms overlap. An employee shall not be eligible for more than twelve (12) credit hours per academic year under the provisions of this program.

#### Priorities

Priorities for participation in the Reimbursement Program are established in Section II, paragraph A. of TBR Guideline P-130. In addition, the following priorities will be used by Austin Peay State University in making award decisions:

1. Students taking classes at Austin Peay State University
2. Students taking classes at another TBR or UT institution
3. Students taking classes at other regionally accredited colleges and universities.

### (3) EMPLOYEE AUDIT PROGRAM/NON-CREDIT PROGRAM

#### Stipulations

- a. Except for retirees, employees should limit the number of courses audited so as to maintain optimum job performance. Six credit hours is the maximum allowed per term or two non-credit courses per term. However, if the term is less than 12 weeks, APSU will support a maximum of three hours per term. An employee cannot use the Employee Audit Program for both FCC and on campus if the terms overlap.
- b. Non-credit courses are limited to on-campus courses only. They must be job related and contribute directly to the performance of duties within the employee's office. Requests with appropriate justification will be forwarded through supervisory channels to the division head. As the final approval authority for the request the

division head will approve or disapprove the action. Disapprovals may be based upon lack of funding or other appropriate reasons as determined by the division head.

c. Eligibility for the Employee Audit Program is established in Section III, paragraph A. of TBR Guideline P-130. In addition the following priorities will be used by Austin Peay State University in making award decisions:

1. Students taking classes at Austin Peay State University
2. Students taking classes at another TBR or UT institution
3. Students taking classes at other regionally accredited colleges and universities.

(4) **CLERICAL AND SUPPORT STAFF MAINTENANCE FEE REIMBURSEMENT PROGRAM**

An employee shall not be eligible for the provisions of this program unless he/she has used the "Fee Waiver for TBR/UT System Employees - PC-191." See section 5.

**Level of Support**

Payment by APSU will be restricted to an amount not exceeding the established Tennessee Board of Regents maintenance or tuition related fees for a three (3) credit hour course. Tuition related fees might include maintenance fees, tuition, debt service fees, technology access fees, on-line fees, services charges and incidental fees payable at registration. The employee will be responsible for application fee and required deposits.

**Main Campus Credit Hour Limit**

It is the intent of the APSU Clerical and Support Staff Maintenance Fee Payment Program that employees normally will be eligible for three (3) credit hours per term, which is defined as a traditional length academic semester; however, the structure of the academic calendar in the summer may permit an employee to be eligible for (6) credit hours.

**Fort Campbell Course Limit**

Employees will be eligible for three (3) credit hours per Fort Campbell term, defined as Fall 1, Fall 2, Spring 1, Spring 2 and Summer 3.

An employee cannot use the Maintenance Fee Reimbursement Program for both FCC and main campus courses if the terms overlap. An employee is not eligible for more than twelve (12) credit hours per academic year under the provisions of this program.

**Stipulations**

Except for retirees, courses should be scheduled at times other than during regularly scheduled work assignments unless use of compensatory time or annual leave has been approved.

Eligibility for the Clerical and Support Staff Maintenance Program is established in Section IV; paragraph A. of TBR Guideline P-130. In addition to the eligibility established in the TBR guideline, Austin Peay State University will use the following in making approval decisions:

1. Students taking classes at Austin Peay State University
2. Students taking classes at another TBR or UT institution
3. Students taking classes at other regionally accredited colleges and universities.

(5) FEE WAIVER FOR TBR/UT SYSTEM EMPLOYEES

Eligibility for the PC-191 Fee Waiver is documented in Section V, paragraph A. of TBR Guideline P-130. In addition, the following priorities will be used by Austin Peay State University in making approval decisions:

1. Students taking classes at Austin Peay State University
2. Students taking classes at another TBR or UT institution
3. Students taking classes at other regionally accredited colleges and universities.

Main Campus Course Limit

It is the intent that employees normally will be eligible for one course per term, which is defined as a traditional academic semester; however, the structure of the academic calendar in the summer may permit an employee's eligibility for more than one course.

Fort Campbell Course Limit

Employees will be eligible for one PC-191 course per Fort Campbell term, defined as Fall 1, Fall 2, Spring 1, Spring 2 and Summer 3.

An employee cannot use the PC-191 Fee Waiver for both FCC and main campus courses if the terms overlap. An employee is not eligible for more than four (4) courses per academic year under the provisions of this program.