

**Austin Peay State  
University**

## **Educational Expenses for APSU Employees**

**Issued:** August 17, 2018

### **POLICIES**

**Responsible Official:** Vice President for Finance and Administration

**Responsible Office:** Human Resources

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#### **Policy Statement**

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It is the policy of Austin Peay State University to support the continued professional growth and development of employees by offering educational assistance to those who meet the requirements outlined below.

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#### **Purpose**

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The purpose of this policy is to establish the process and procedures regarding educational assistance for APSU employees.

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##### **Related Forms**

- Employee Scholarship Forms

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- APSU Policy 1:021
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#### **Procedures**

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##### **Support for Educational Assistance**

- A. APSU is committed to the need for the continued professional growth and development of employees.

1. Support for educational assistance of personnel and their dependents is an important vehicle for addressing that need.
  2. The programs described in this guideline provide benefits to personnel at APSU to further their formal education.
  3. With the exception of the Fee Waiver (formerly referred to as PC-191) which is mandated by the State of Tennessee (T.C.A. § 49-7-116), the classes and programs for APSU employees and dependents are available subject to funds being budgeted and available within the University.
  4. The programs are:
    - a. Fee Waiver for Tennessee Public Institution Employees Program (formerly PC-191)
    - b. Faculty and Staff Tuition Reimbursement Program
    - c. Employee Audit/Non-Credit Program
    - d. Faculty or Administrative/Professional Staff Grant-in-Aid Program
- B. APSU may develop and administer educational or professional development programs that are designed to advance the objectives of the University’s diversity plan.
- C. Exceptions to the provisions of the programs for APSU employees can be made upon recommendation of the President.
- D. For-credit coursework attempted through one of the programs in this guideline, the coursework must be through an institution accredited by one of the Regional Accrediting Organizations recognized by the Council for Higher Education.

**Taxation of Educational Assistance Programs**

- A. A portion of undergraduate and graduate course tuition, paid by APSU may be eligible for exclusion from the employees' gross annual income, in accordance with Internal Revenue code (IRC). Employees should seek assistance from their personal tax consultants on this issue, however.

**Fee Waiver for Tennessee Public Institution Employees Program**

- A. Full-time regular employees of APSU and members of the ROTC Cadre at APSU are eligible to enroll in one credit course per term at any state of Tennessee public postsecondary institution, with fees waived for the employee.
- B. The waiver is limited to one class, not to exceed 4 credits or 120 clock hours. It may be applied for partial payment of

classes of more than 4 credit hours or 120 clock hours.

- C. The enrollment is limited to available space with the intent that tuition-paying students shall not be denied enrollment by a student using a fee waiver.
- D. If applicable, the fee waiver should be used before other forms of educational assistance that may be offered by the institution.
- E. Eligibility
  - 1. All full-time employees (faculty, administrators, and support staff) of the University are eligible to participate.
  - 2. The employment status of an employee on the published first day of classes for each term determines eligibility for participation in this program. Any change in employment status after the first day of classes shall not affect eligibility for that term or the amount of assistance received.
- F. Fees Paid/Type Course Paid/Number of Hours
  - 1. This waiver applies to one credit course, graduate or undergraduate, which includes maintenance fees, registration fees, tuition, debt service fees, technology access fees, online course fees, TN eCampus fees, and service charges.
    - a. There is a limit of one course per term with a maximum limit of four (4) terms per year.
    - b. Term is defined as a period of time for which a student receives a grade; however, the term for which the PC191 form is used must end before the same form may be used for another term. (Class end date and start date for the next term must not overlap).
    - c. Employees are responsible for special course fees, books and supplies, application fees, applied music fees, lab fees, off-campus facility fees, parking fees, traffic fines and similar fees.
    - d. Employees are not eligible for fee waivers at more than one institution per term.
  - 2. This waiver applies to courses that are normally offered for-credit, although auditing a course is allowed.
    - a. Employees must meet the regular academic rules and regulations of the institution offering the course.

- b. This program does not apply to continuing education or other non-credit courses.
- 3. Fees will not be waived for programs for which part-time or course-by-course enrollment is prohibited as determined by the University, or where costs exceed regular for-credit courses.
  - a. Examples include, but are not limited to, programs of law, medicine, dentistry, pharmacy, and veterinary medicine.

G. Payback Provisions

- 1. Payback provisions do not exist.

H. When the Participant May Attend

- 1. Supervisors/Department Heads who approve Fee Waiver applications should keep in mind that job performance is paramount and must receive priority.
- 2. Courses should be scheduled at times other than during regularly scheduled work hours unless the use of annual leave or an alternate work arrangement is documented and approved by the supervisor prior to enrolling in the course.

I. Accounting/Budgeting Provisions

- 1. An employee must complete the Fee Waiver section of the Request for Educational Assistance form (PC-191) through Web Self Service in OneStop and receive approval from his/her supervisor prior to registering for a course.
- 2. If the employee is attending APSU, the expenditure is charged to employee benefits.
  - a. If the employee is attending another institution, the institution attended charges the expenditure to scholarships and fellowships.
  - b. The University does not recognize an expenditure when an employee attends another institution.
- 3. The Tennessee Public Institutions do not exchange funds for employees taking courses between the systems.

**Faculty and Staff Tuition Reimbursement Program**

- A. This program's general goal is to encourage faculty and staff members to develop their skills and knowledge through participation in educational programs and is intended to serve as a means of job-related career development.

- B. The program is designed to provide assistance for an employee who takes credit courses in a degree program while continuing work responsibilities.
- C. The program should be used in the employee's pursuit of a degree that is judged by the employer in its sole discretion to be beneficial to the University.

1. Eligibility

- a. Any regular part-time or full-time employee or member of the ROTC Cadre who has been continuously employed by the University for at least six months, may, upon verification of service, be eligible to participate.
  - 1. Regular part-time employees may receive a pro rata portion of assistance based on percentage of employment.
  - 2. Employees with prior temporary service immediately preceding regular employment shall receive credit for such service if they qualify for leave accrual and longevity adjustments.
- b. APSU employees who retire with at least 10 years of state service maintain eligibility under this program.

2. Fees Paid/Type Course Paid/Number of Hours

- a. This program is designed to provide maintenance or tuition-related fees for a maximum of six (6) credit hours per term, as term is defined by the University, with a maximum of four (4) terms per year.
- b. Term is defined as a period of time for which a student receives a grade. If the form is used for the six hours allowed under this program, the form may not be used for another term until the current term ends. If only three hours are taken during the term, the form may be used for the additional three hours for an overlapping term. (Class end date and start date for the next term must not overlap when the six hours allowed per term have been covered under this program).
- c. Tuition-related fees may include maintenance fees, registration fees, tuition, debt service fees, technology access fees, online course fees, TN eCampus fees, service charges and incidental fees payable at the time of registration.
- d. Employees are responsible for required deposits, special course fees, books and supplies, application

fees, applied music fees, lab fees, off-campus facility fees, parking fees, traffic fines and similar fees.

- e. Employees must meet the requirements for admission and the regular academic rules and regulations of the institution offering the course.

### 3. Payback Provisions

- a. Unless retired, the recipient shall be required, after completion of the course or courses, to be employed for not less than one (1) month of full-time employment for each month of the term of participation in the Staff Tuition Reimbursement Program.
  1. Early voluntary separation will, therefore require the employee to reimburse the University for the remaining balance of this commitment.
- b. In order to receive future reimbursement, participants must satisfactorily complete all course requirements as defined by the academic program in which they enrolled. A grade of Incomplete at the conclusion of the grading period or a withdrawal is not considered as satisfactory completion. The employee must pay for and satisfactorily complete the same number of hours before again being eligible for this program. Exceptions will be made only in cases (1) where a course is failed for health reasons or (2) where another substantial reason is recognized by the attending institution's academic guidelines.
- c. Other exceptions to these payback provisions may be granted by the President. Documentation of extenuating circumstances must be provided..

4. For employees taking courses not at APSU, reimbursement applications shall be conditionally approved and held by the office designated by the institution to process these requests until the employee requests reimbursement and documents satisfactory course completion. At that time, the employee will be reimbursed for the prior course(s) and subsequent applications may be conditionally approved.

5. At the institution's discretion, fees may be waived for classes taken at the home institution, but employees will be subject to the provisions of this guideline regarding service time after the class and satisfactory course completion. Successful completion of courses must be

documented before being granted approval to take subsequent classes under this program.

6. When the Participant May Attend
  - a. Courses should be scheduled at times other than during the regularly scheduled work hours unless the use of annual leave or an adjusted work schedule has been documented and approved by the supervisor prior to enrolling in the program.
  
7. Accounting/Budget Provisions
  - a. Requests for approval to participate in the Reimbursement Program shall be submitted via Web Self Service in OneStop.
    1. If the employee is required to pay fees when due, fees may be paid in accordance with the provisions of APSU Policy 1:021, provided a Deferred Payment Plan has been implemented at the institution the employee is attending.
  - b. APSU shall account for the chargeback as an employee benefit to indicate APSU is paying the cost for the benefit of the employee. APSU shall remit the tuition fees to the institution providing instruction as maintenance income.
  
8. Limits on Tuition Reimbursement Rates
  - a. Requests for participants attending public institutions will be reimbursed at the current semester hour rate for that institution.
  - b. For individuals who wish to attend other than a Tennessee public institution under this program, reimbursement will not exceed the highest current semester hour rate for a comparable program offered by a Tennessee public institution.
  - c. Reimbursement for concentrated programs at public or private institutions will be limited to the prevailing graduate fee rate for a comparable program within a Tennessee public institution.

**Employee Audit/Non-Credit Program**

- A. This program is designed to provide course or maintenance fees only for an employee who takes courses based on one of the following:
  1. Audit;
  2. Job-related non-credit basis;
  3. Any wellness-related courses that are clearly designed to positively affect one's physical well-being as defined by

the University.

B. Such courses may be taken at APSU or another Tennessee public institution while continuing work responsibilities at APSU.

1. Eligibility

- a. Any regular part-time or full-time employee or member of the ROTC Cadre who has been employed by the University for at least six months may, upon verification of service, be eligible to participate.
  1. Employees with prior temporary service immediately preceding regular employment shall receive credit for such service if they qualify for leave accrual and longevity adjustments.
  2. Requests for approval to participate shall be submitted on the request form through Web Self Service in OneStop. Regular part-time employees may receive a pro rata portion of assistance based on percentage of employment.
- b. APSU employees who retire with at least 10 years of state service immediately preceding retirement maintain eligibility under this program.
- c. With the exception of retirees, as stated above, the employment status of an employee on the published first day of classes for each term determines eligibility for participation in this program. Any change in employment status after the first day of classes shall not affect eligibility for that term or the amount of assistance received.
- d. Retired state employees with 30 or more years of service are eligible to audit courses at TN State Universities or Community Colleges without charge.

2. Fees Paid/Type Course Paid/Number of Hours

- a. This program is designated to pay maintenance or tuition-related fees for audit, job-related non-credit courses, or wellness courses to a maximum of six credit hours or two job-related non-credit or wellness courses per term.
- b. Tuition-related fees may include maintenance fees, registration fees, tuition, debt service fees, technology access fees, online course fees, TN eCampus fees, service charges and incidental fees payable at the time of registration.



- c. Job related courses designed to prepare an individual to sit for specific certification or licensure exams may be eligible for reimbursement under this program, subject to approval by the University.
3. Payback Provisions
    - a. Payback provisions do not exist.
  4. When the Participant May Attend
    - a. Supervisor/Department Heads who approve participation in this program should keep in mind that job performance is paramount and must receive priority.
    - b. Courses should be scheduled at times other than during regularly scheduled work hours unless the use of annual leave or an adjusted work schedule has been documented and approved by the supervisor prior to enrolling in the course.
    - c. Course enrollment will be permitted on a "space available" basis. The enrollment is limited to available space with the intent that tuition-paying students shall not be denied enrollment by a student using the Employee Audit/Non-Credit Program.
    - d. An employee may register only after the formal registration period ends as defined by the University.
  5. Accounting/Budgeting
    - a. Requests for APSU employees shall be submitted to Human Resources on a Request for Educational Assistance form through Web Self Service in OneStop at least two weeks prior to enrollment in the course or courses.
      1. State retirees shall submit forms developed by the Tennessee Higher Education Commission available at <http://www.tn.gov/thec/topic/fee-waiver-and-fee-discount-programs>
    - b. The University shall account for the chargeback as an employee benefit to indicate the employer is paying the cost for the benefit of the employee.
      1. The University shall remit the tuition fees to the institution providing instruction as maintenance income.
    - c. Forms for state retirees shall be processed by the University in the same manner as fee waivers for state employees.

6. Where the Participant May Attend
  - a. All such audit/non-credit courses must be accomplished at APSU, where the person is/was employed or another Tennessee public institution.
  - b. Employees requesting the program must meet the requirements for admission and are subject to institutional regulations and academic procedures.

**Related Forms**

**Employee Scholarship Forms**      <http://www.apsu.edu/human-resources/forms.php>

**Links**

**APSU Policy 1:021**      [http://www.apsu.edu/policy/1s\\_governance\\_organization\\_and\\_general\\_policies/1021-fees-charges-refunds-and-fee-adjustments.php](http://www.apsu.edu/policy/1s_governance_organization_and_general_policies/1021-fees-charges-refunds-and-fee-adjustments.php)

**Council for Higher Education**      <http://www.chea.org/>

**THEC State Retirees Forms**      <http://www.tn.gov/thec/topic/fee-waiver-and-fee-discount-programs>

**Revision Dates**

APSU Policy 5:001– Rev.: August 17, 2018  
 APSU Policy 5:001– Rev.: October 12, 2017  
 APSU Policy 5:001– Rev.: January 4, 2017  
 APSU Policy 5:001– Rev.: September 14, 2015  
 APSU Policy 5:001– Rev.: December 20, 2010  
 APSU Policy 5:001– Rev.: February 2, 2009  
 APSU Policy 5:001– Rev.: April 4, 2007  
 APSU Policy 5:001– Rev.: July 11, 2002  
 APSU Policy 5:001– Rev.: December 2, 1998  
 APSU Policy 5:001 – Issued: May 27, 1998

**Subject Areas:**

Academic	Finance	General	Human Resources	Information Technology	Student Affairs
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**Approved**

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President: signature on file

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