

Tuition Benefit Guidelines

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Tuition Benefit Guidelines

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- Extended Tuition Benefit (XTBP)



Categories of Supported Students



Categories of Supported Students

- Graduate Research Assistant (RA, 9314)
- Graduate Assistant – Research Focus (GR, 9330)
- Graduate Teaching Assistant (TA, 9416)
- Graduate Assistant – Teaching Focus (GT, 9417)
- Graduate Fellow (GF)



Categories of Supported Students

Graduate Research Assistant (RA)

- Job code 9314
- Exempt
- Payroll must come off grant project (5000 fund)
- Job duties support the research mission of the University



Categories of Supported Students

Graduate Assistant – Research Focus (GR)

- Job code 9330
- Exempt
- Payroll must come from an activity (institutional funds), and cannot come from a 5000 fund
- Job duties support the research mission of the University



Categories of Supported Students

Graduate Assistant – Research Focus (GR)

- This classification should also be used for students in a ‘professional education/practicum’ sort of role (e.g. an MSW student working in the UCC)
- GRs working outside of their academic department require approval by the Dean of the Graduate School (tuitionbenefit@gradschool.utah.edu)



Categories of Supported Students

Graduate Teaching Assistant (TA)

- Job code 9416
- Exempt
- Payroll *generally* comes from state funds (1001)
- Supports department/classroom education, including direct instruction, instructional design, grading, etc.
- Wages cannot be decreased mid-semester based on final student enrollments



Categories of Supported Students

Graduate Assistant – Teaching Focus (GT)

- Job code 9417
- Exempt
- Payroll generally comes from state funds (1001)
- International students in their first semester of a teaching assistantship assignment
- Assistants are required to complete the International Teaching Assistant Program (ITAP) before being classified as a TA, clearance provided by ITAP manager Diane Cotsonas



Categories of Supported Students

Graduate Fellow (GF)

- Not supported on payroll
- No work obligations, though funders can require maintenance of a certain GPA or completion of degree milestones for fellowship funding to continue
- Processed through Scholarship Administration



Categories of Supported Students

Graduate Fellow (GF), *trainees*

- Grant/funding source doesn't allow research trainees (students) to be compensated via payroll
- Students paid in monthly/quarterly stipends (as required by the funding source) via AP with the required placeholder in Scholarship Administration
- Requiring training commitments (e.g. lab obligations) are allowable as required by the funding source



Categories of Supported Students

Students supported by assistantships

- For federal tax purposes, TBP job codes are only to be used when students are supported by TBP in an assistantship that is related to a student's educational and professional objectives
- Wages will only count toward tuition benefit minimum support when:
 - a) Earned on appropriate job code(s)
 - b) Earned during the appropriate pay periods (e.g. Fall support must be earned between August 16 and December 31)



Categories of Supported Students

Students may be supported in more than one classification, such as the following examples:

- Student working in a lab on faculty startup, but grant funding becomes available mid-semester – student would be a mix of RA and GR
- Student working in a limited teaching assistantship, such as 10 hours a week, and also receiving a graduate fellowship – student would be a mix of TA and GF



Student Registration Requirements & Tuition Billing



Student Registration Requirements

Students participating in the Tuition Benefit Program (including XTBP) must meet the following requirements:

- Matriculated graduate student
- In good academic standing with program
- Enrolled in a minimum of 9 credits (fall/spring) or 3 credits (summer); tuition benefits will not disburse if enrollment requirement is not met



Student Registration Requirements

9 Credit Enrollment Requirement

- TBP will cover 9-12 graduate credits
- TBP does not cover undergraduate or repeated courses (outside those *required*); however, these courses can count toward the 9 credit minimum



Student Registration Requirements

Repeated courses

- Tuition benefit will cover *if* required by degree program (usually thesis/dissertation)
- TBP will not cover repeats for a higher grade or to refresh, even if program requires a student to retake a class for a higher grade



Student Registration Requirements

Academic Year Limits

- Academic year defined as Fall, Spring, and Summer semesters
- If a student is supported on TBP Fall & Spring, they will have an AY limit of 24 graduate credits
- If a student is supported on TBP Fall or Spring semesters, they will have an AY limit of 12 graduate credits
- Example: a student supported on TBP the entire AY may choose to enroll in 9 credits Fall, 9 credits Spring, and 6 credits Summer



Student Registration Requirements

Enrollment Accommodations

- TBP will honor a reduced enrollment accommodation as approved by the Center for Disability & Access (CDA)
- No other accommodations will be granted without CDA approval



Student Registration Requirements

Withdrawn Courses

- A withdrawn course are credits *a student has removed from active enrollment after the semester add/drop deadline*
- Tuition benefit does not cover withdrawn courses
- *If a student's active enrollment remains 9 credits or higher, TBP will be applied as usual and student will be responsible for withdrawn course*
- *If a student's active enrollment drops below 9 credits, they will no longer be eligible for tuition benefits*



Tuition Billing

Tuition is assessed by the Office of Income Accounting

- Students are billed according to their residency status (Utah resident, domestic non-resident, international)
- Eligible domestic non-resident & international students supported on TBP will have a non-resident tuition waiver applied to tuition in addition to tuition benefits



Tuition Billing

Dissertation Credit Billing Reduction

- Limited to 1) PhD students, and 2) enrollment in eligible dissertation credits (catalog range 7970-7989)
- Dissertation credits billed at a reduced rate of approximately 1/3 (after zero hour fee)
- Tuition is assessed by course; students in a mix of dissertation and coursework will have dissertation charged at the reduced rate and coursework at the usual rate



Tuition Billing

Tuition Benefit Covers

- Resident tuition up to 12 graduate credits (up to 6 graduate credits during summer)
- Mandatory fees
- Non-resident waiver, where applicable and eligible



Tuition Billing

Tuition Benefit *Does Not* Cover

- Differential tuition
- Fees outside of mandatory fees
- Undergraduate courses
- Repeated courses (outside those required by curriculum)
- Graduate credits exceeding 12.0
- Non-credit/continuing education courses
- Withdrawn courses
- Audited courses
- International student fees



Tuition Billing

RA 84-Credit Hour Rule

- Students supported on TBP as RAs (9314) concurrent to the semester(s) in which they have met or exceeded 84 cumulative graduate credits will be responsible for the non-resident portion of their tuition.
- Affected student who have completed required coursework may enroll in thesis/dissertation hours (9 credits – no more/no less).
- Departments choosing to cover the non-resident charges can do so through Scholarship Administration



Financial Support Requirements



Financial Support Requirements

Semester	100% Benefit	75% Benefit	50% Benefit
Summer 2023	\$5,570	\$4,175	\$2,785
Fall 2023	\$10,000	\$7,500	\$5,000
Spring 2024	\$10,000	\$7,500	\$5,000
Summer 2024	\$6,670	\$5,000	\$3,330

- Semester support minimums are prorated by pay period: 9/fall, 9/spring, 6/summer



Financial Support Requirements

- Financial support consists of assistantship wages and/or fellowships
- Students can be on more than one assistantship (e.g. limited RA and limited TA)
- Students can be supported by a mix of assistantship and fellowship



Financial Support Requirements

- Assistantship wages will only count when earned during the proper semester:
 - Fall : August 16 thru December 31 (9 pay periods)
 - Spring : January 1 thru May 15 (9 pay periods)
 - Summer: May 16 thru August 15 (6 pay periods)
- Fellowships will only count when:
 - Disbursed through Scholarship Admin noting the proper term (fall, spring, summer)
 - Stipends paid through AP disbursed within the semester



Financial Support Requirements

- Benefits are posted conditionally and in good faith according to the amount of anticipated support entered by the coordinator
- After the final paycheck for the semester, benefits are adjusted based on actual support
- If a student didn't receive the minimum required support for the conditional benefits posted, their final benefits will be reduced to an eligible benefit (50%, 75%) or removed completely, leaving a student with an outstanding tuition bill & registration/transcript holds



Service Requirements

Service Requirements

- No student should be required to work more than 20 hours/week (0.50 FTE) for 100% tuition benefit
- Recommended work requirements are as follows:
 - 100% benefit: 20 hours/week (0.50 FTE)
 - 75% benefit: 15 hours/week (0.375 FTE)
 - 50% benefit: 10 hours/week (0.25 FTE)



Service Requirements

- Students can have campus employment outside of TBP; however, their total University of Utah FTE cannot exceed 0.74 – doing so will result in an immediate lost of tuition benefit
- FTE restriction includes University of Utah athletics, hospital & clinics, etc.
- Unless holding a benefitted position, students with an FTE 0.75 or higher will not qualify for the 50% faculty/staff tuition reduction



Residency & Meritorious Status



Residency Classification

- As approved by the University president and the Utah System of Higher Education's (USHE) Utah Board of Higher Education (formerly Board of Regents) policy, non-resident students participating in TBP may benefit from a non-resident waiver
- Graduate tuition is posted at the appropriate rate (50/75/100%) with a non-resident waiver, where applicable



Residency Classification

- USHE allows domestic non-resident graduate students receiving a tuition benefit to be eligible to apply for Utah residency upon the completion of 40 graduate credits at the University of Utah
- A student's ability to establish residency will not affect eligibility of a tuition benefit



Residency Classification

- Comprehensive and aggressive action should be taken by departments to ensure eligible students are encouraged to apply for Utah residency when eligible
- A department/program cannot require a student to change their residency, but the University does require that departments routinely inform and encourage eligible students of the opportunity to apply for residency
- Visit admissions.utah.edu for residency reclassification information



Meritorious Status

- The Tuition Benefit Program is a merit tuition benefit provided by the University of Utah as allowed by USHE policy
- Participating students must meet and maintain a meritorious status, as is defined by the President of the University (see next slide)



Meritorious Status

Meritorious Status Requirements

- Admission to the University as a matriculated graduate student
- Selection on the basis of merit, determined by written policy (i.e., grad handbook)
- Recommended by the department chair
- Maintenance of status includes the following:
 - Remaining in good academic standing in graduate program
 - Completion of required milestone exams and program requirements by program deadlines
 - Maintenance of a 3.000 cumulative GPA



Terms of Eligibility & Restrictions

Terms of Eligibility & Restrictions

Students are limited in traditional tuition benefit eligibility based on the following:

- Academic program of study (masters, doctorate)
- Educational background (earned degrees)



Terms of Eligibility & Restrictions

Scenario 1:

Students in a master's program who enter with a bachelor's degree are eligible for up to two years (four semesters) of tuition benefit support

- No previously earned masters or doctorate



Terms of Eligibility & Restrictions

Scenario 2:

Students in a doctoral program who entered with a bachelor's degree are eligible for up to five years (ten semesters) of tuition benefit support

- No previously earned masters or doctorate



Terms of Eligibility & Restrictions

Scenario 3:

Students in a doctoral program who entered with a master's degree at the University of Utah are eligible for up to five years (ten semesters) of tuition benefit support

- No previously earned doctorate
- Master's degree at the U is counted regardless of timing or discipline



Terms of Eligibility & Restrictions

Scenario 4:

Students in a doctoral program who entered with a master's degree from another university are eligible for up to four years (eight semesters) of tuition benefit support

- No previously earned doctorate
- Master's degree from external institution is counted regardless of timing or discipline
- Include students who also earned a master's from the University of Utah in addition to an external master's



Terms of Eligibility & Restrictions

- Traditional tuition benefit will only pay for first master's and first doctorate
- Previously earned degrees are counted regardless of the following:
 - Institution at which the degree was earned
 - Country of the institution
 - Discipline of the degree
 - Date of degree conferment
- Departments wishing to support a student on TBP when they have previously earned degrees that disqualify them for TBP may do so with extended tuition benefit (XTBP)



Terms of Eligibility & Restrictions

- Doctoral students who have served a minimum of four semesters as teaching assistants (TA and/or GT) may be eligible for an additional two semesters of TBP eligibility beyond the limits described
- Coordinators or DOGS will make the extension request when the student has exhausted their eligibility



Terms of Eligibility & Restrictions

- It is the responsibility of students and the department to maintain an accurate count of the semesters of tuition benefit support a student has received
- Coordinators are able to utilize TBP reports which contain semester usage counts



Terms of Eligibility & Restrictions

Summer Tuition Benefit:

- All classifications of support (TA, GT, GR, GF, and RA) are eligible for summer tuition benefit
- Student must have been previously supported in the academic year (the immediate previous fall and/or spring semesters)
- Summer tuition benefit participation does not count towards a student's terms of eligibility



Terms of Eligibility & Restrictions

Summer Tuition Benefit:

- If a student is supported on TBP Fall & Spring, they will have an AY limit of 24 graduate credits
- If a student is supported on TBP Fall or Spring semesters, they will have an AY limit of 12 graduate credits
- Example: a student supported on TBP the entire AY may choose to enroll in 9 credits Fall, 9 credits Spring, and 6 credits Summer



Terms of Eligibility & Restrictions

Summer Tuition Benefit:

- Students must enroll in a minimum of 3 credits for summer TBP to be applied to tuition charges
- The 3 credit minimum is required, *even if the student has an eligibility of less than 3 credits*
- TBP will cover as little as 0.50 graduate credits during the summer term, provided 3 credit enrollment minimum is satisfied
- In cases where TBP does not cover all tuition charges, the student will be responsible
- Departments wishing to cover remaining summer charges would do so through Scholarship Administration



Administration of the Tuition Benefit Program



Administration of TBP

- TBP is administered by the Graduate School in partnership with participating colleges and departments
- Verification of a student's eligibility is the responsibility of the student's academic department
- A student's eligibility shouldn't be interpreted as a guarantee



Administration of TBP

Tuition Benefit Funding

- Participating colleges are provided with a TBP allocation to cover resident tuition & mandatory fees
- Non-resident waivers are not charged to college allocations
- Allocations cover TBP costs of students supported on the following classifications:
 - Teaching assistants (TA, GT)
 - Graduate assistants, research focused (GR)
 - Graduate fellows (GF)



Administration of TBP

Tuition Benefit Funding

- Use of TBP allocations are determined by each participating college's dean, or dean's designee, and distributed to departments as it aligns with the college's strategic goals
- Departments concerned over TBP allocations should engage in conversations with deans for a possible redistribution within the college
- Strategic growth requiring additional TBP support (for TA/GT/GR/GFs) should be a part of the college's annual budget request



Administration of TBP

Tuition Benefit Funding

- Departments supporting students as research assistants (RA) will have resident tuition and mandatory fees charged to the college's F&A returned overhead
- Department leadership should work with their deans to determine the strategic use of RAs in their program



Administration of TBP

Tuition Benefit Funding

- Students supported on XTBP will have resident tuition and mandatory fees charged to funding source (projects for RAs, activities for all other classifications)
- Coordinators will provide chartfield(s) at the time of student entry



Administration of TBP

Removal of Benefits

- A student's tuition benefits may be reduced or removed if a graduate student receives a conditional benefit for the semester, but:
 - Withdrew from courses, dropping below the required enrollment of 9 credits
 - Received less than the minimal required financial support for their level of benefit
 - In any way did not meet the requirements or restrictions associated with Graduate School policy or guidelines



Administration of TBP

Removal of Benefits

- It is the responsibility of the department's tuition benefit coordinator to first diagnose tuition benefit concerns using their TBP reports
- After consulting reports & guidelines, coordinators may elevate student issues to the Graduate School (tuitionbenefit@gradschool.utah.edu)



Administration of TBP

Entry of Benefits

- TBP portal opens for student entry six weeks prior to the first day of school
- Portal will remain open until the campus census date
- Department's responsibility to have students entered into system in a timely manner
- Retroactive benefits are not processed



Administration of TBP

Tuition Benefit Coordinator Role

- It is the responsibility of each participating department to appoint an individual to serve as the primary tuition benefit coordinator.
- Responsibilities include:
 - Timely entry of students into the TBP portal
 - Routinely running & reviewing coordinator reports
 - Addressing TBP department and student concerns
 - Liaising within the department to address pertinent tuition benefit concerns



Administration of TBP

Director of Graduate Studies Role

- Graduate admissions process, including ensuring tuition benefit and student support is administered appropriately
- Organizing student orientations and providing student funding updates
- Resolve student TBP issues, student petitions
- Support TBP coordinator and ensure TBP process is smooth
- Communicating TBP needs to appropriate bodies



Petitions for Exception to Tuition Benefit Policy



Petitions

- Petitions may be submitted on behalf of a student by a department chair, or chair's designee
- Exceptions considered for personal emergencies such as illness or extenuating family circumstances
- Petitions should be sent to tuitionbenefits@gradschool.utah.edu (new process and portal will be rolled out in July)



Petitions

To be eligible for a TBP petition, a student must meet the following requirements:

- Remain in good standing in their academic program
- Formation of a committee
- Grad Student Degree Tracking up to date (including program of study entered and approved by committee)
- Qualifying exams completed
- Completion of other milestones as required by a degree program to define good standing



Petitions

If a tuition benefit extension is granted, the department will be responsible for the following:

- Providing minimum required support (assistantship and/or fellowship)
- Having tuition benefit allocation (for TA/GT/GR/GF) to cover resident tuition & mandatory fees or having costs charged to & F&A returned overhead (for RA)



Petitions

Alternatives to Petitions for TBP Extension

- If student is an RA and their support is paid by a research grant, the PI of the grant can pay the tuition directly from grant funds (XTBP)
- Use of departmental funds, reimbursed overhead, donor funds, or faculty startup accounts to cover tuition directly (XTBP)
- If no other options are available, a student may register for the minimum credit hours necessary to maintain continuous registration (1 credit hour) and pay directly (3 credits or higher may be required for visa, student loan, and or health insurance eligibility)



Extended Tuition Benefit (XTBP)

XTBP

XTBP can be used for the following:

- Charges tuition benefits to research projects where tuition has been budgeted
- Charges tuition benefits to institutional funds/activities (donor funds, faculty startup, etc.)
- Extend tuition benefits for those students who have utilized all their eligible semesters



XTBP

XTBP considerations

- Covers resident tuition and mandatory fees (same as traditional TBP)
- Non-resident waivers not charged to XTBP funds
- XTBP students' tuition charged at appropriate resident rate, PhD students in dissertation credits billed at appropriate reduced rate



XTBP

XTBP considerations

- XTBP does not cover differentials, int'l student surcharge, or other miscellaneous fees outside of mandatory fees
- Departments/PIs choosing to cover extra charges not covered by XTBP will do so via Scholarship Administration

XTBP

XTBP considerations

- Similar to traditional TBP, XTBP students must be enrolled full-time (minimum 9 credits) and maintain a cumulative GPA of 3.000 or higher
- FTE cannot exceed 0.74
- Choosing to cover tuition via Scholarship Administration instead of (X)TBP may result in loss of non-resident waiver and GSHIP



XTBP

XTBP & Sponsored Projects

- The grant/project must have tuition waivers budgeted
- Charges to grants/projects will follow student's payroll efforts
- Example: if a student has payroll 50% from a project (grant) and 50% from an activity (faculty startup), only 50% of tuition costs will be charged to the project



Upcoming Workshops



Upcoming Workshops

- May 24, 11am – TBP Coordinator Operations
- June 2, 11am – TBP & Enrollment Management
- June 6, 11am – GSHIP Overview
- July 6, 11am – TBP Fall Prep F&Q
- August 2, 11am – Graduate School Funding Opportunities



Questions?

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Graduate School

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For general Tuition Benefit Program assistance, email tuitionbenefit@utah.edu

For fellowship concerns, email fellowships@gradschool.utah.edu

To schedule meetings, email matthew.plooster@utah.edu

