

DIVISION: <b>ADMINISTRATION/HUMAN RESOURCES</b>	
SUBJECT: <b>Tuition Remission – Retiree</b>	Page 1 of 5
Policy Number:	Supersedes: <b>Tuition Remission (Employee/Retiree)</b>
Effective Date: <b>09/03/13</b>	Previously Issued: <b>04/27/10</b>

## 1. STATEMENT OF POLICY:

The University offers tuition remission benefits to eligible retirees as part of its overall benefits package and in appreciation for their years of service. As an institution of higher education and one steeped in traditions which place a high value on education and learning, the University extends this benefit, as defined by policy, to competitively recruit and retain an excellent faculty and staff, as well as to support their academic and professional goals. Tuition remission benefits are a privilege, not a right.

The purpose of this policy is to clearly explain the responsibilities and parameters by which tuition remission benefits become available, the limits to these benefits and the conditions under which the benefits might be forfeited. Any exception to the tuition remission policy must be approved in writing by the Vice President for Human Resources, unless otherwise noted in the policy. The University reserves the right to revise, supplement or rescind any provision or term in this policy, from time to time, at its sole discretion.

## 2. POLICIES/PROCEDURES:

### Eligibility for Benefits

#### *Eligible for Tuition Remission Benefits*

Individuals who, at time of retirement, are at least 65 years of age, tuition remission benefits eligible, with 10 years of service with the University (or 5 years of service with the University if hired at age 55 or older) (referred to hereinafter as “eligible retiree”) are eligible for tuition remission benefits for undergraduate and graduate courses, provided that certain requirements are met.

### Admissions and Academic Eligibility Requirement

Eligibility for tuition remission benefits does not guarantee admission to any academic program. All eligible retirees must meet the admissions requirements in order to be admitted to any Undergraduate or Graduate/Law School program or under non-degree status. Admission into any academic program is never guaranteed and competition may be intense for a limited number of available openings.

The application and admission processes with their stated requirements and requisite costs are the eligible retiree's responsibility and must be complete before the eligible retiree becomes eligible to receive tuition remission benefits.

## **Use of Tuition Remission Benefits**

### *Costs Covered By Tuition Remission Benefits*

Tuition remission benefits are a tuition credit that is applied to a matriculating eligible retiree's student account. The tuition amount will be credited after the official add/drop period has ended and all revisions to course load and/or tuition charges have been processed by the Registrar's Office.

Tuition remission benefits apply only to tuition costs. An eligible retiree receiving tuition remission benefits is responsible for payment of all fees and for the costs of books, materials or lab costs, or any other incidental costs related to any courses taken pursuant to this Policy.

### *Permissible Degrees/Courses*

In order to be eligible for tuition remission benefits, courses must be taken at the University, Loyola Law School or, in the case of Study Abroad programs, at an approved institution.

### Undergraduate/Graduate Degrees

If qualified, an eligible retiree may apply tuition remission benefits to undergraduate courses taken at LMU towards completion of a single, undergraduate degree from the University.

In addition, if qualified, an eligible retiree may apply tuition remission benefits to graduate courses taken at LMU/Loyola Law School towards completion of a single, Masters degree from the University or *Juris Doctor* degree from Loyola Law School<sup>1</sup>. An eligible retiree may apply tuition remission benefits to the JD/MBA or other dual Masters degree program.

Eligible retirees receive 100% tuition remission credit for undergraduate/graduate courses taken at LMU/Loyola Law School towards completion of a degree.

### Undergraduate/Graduate Courses Taken Under Non-Degree Status

If qualified, an eligible retiree may apply tuition remission benefits to undergraduate or graduate courses taken at LMU under non-degree status. All Bulletin restrictions and requirements apply to courses taken under non-degree status including, but not limited to, restrictions on the number of units/semesters in which an individual may enroll under non-degree status. Eligible retirees receive 100% tuition remission credit for courses taken at LMU under non-degree status.

### Undergraduate/Graduate Courses Taken Pursuant to Credential/Certificate Program

If qualified, an eligible retiree may apply tuition remission benefits to undergraduate or graduate courses taken pursuant to a credential or certificate program offered by one of the University's six Colleges/Schools.<sup>2</sup> Eligible retirees receive 100% tuition remission credit for undergraduate or graduate courses taken at LMU towards completion of an approved credential/certificate program.

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<sup>1</sup> Tuition remission benefits may not be applied to the EMBA or Ed.D degrees offered at the Westchester campus, the LL.M. offered at Loyola Law School or any subsequently created doctorate programs.

<sup>2</sup> Credential/certificate programs offered through LMU Extension are not eligible for tuition remission.

Study Abroad Programs**Semester Study Abroad Programs***Eligibility for Benefit*

An eligible spouse/dependent child enrolled in a degree program at LMU may apply tuition remission benefits to an approved Semester Study Abroad program administered/sponsored by LMU.

*Approved Semester Study Abroad Programs*

Tuition remission benefits may be applied to the following approved Semester Study Abroad programs: LMU administered/sponsored programs in England and Germany, and AJCU administered/sponsored programs in Beijing, China and El Salvador. Additional semester study abroad programs may, at the sole discretion of the University, be deemed eligible for tuition remission benefits. Human Resources will maintain a list of all approved undergraduate semester study abroad programs eligible for tuition remission benefits.

*Amount of Tuition Remission Benefits*

Only the tuition portion of the program costs (as determined by the University) for semester study abroad programs that the University deems eligible for tuition remission benefits will be credited as a tuition remission benefit. The non-tuition program fee is the responsibility of the matriculating eligible retiree.

Tuition remission benefits do not cover incidental costs, such as textbooks, travel expenses, meals, *etc.* All other such costs and fees are the responsibility of the matriculating eligible retiree.

**Summer Session Study Abroad Programs Administered/Sponsored by LMU***Eligibility for Benefit*

An eligible retiree enrolled in a degree program at LMU may apply tuition remission benefits to an approved Summer Session Study Abroad program administered/sponsored by LMU.

*Approved Summer Session Study Abroad Programs*

Human Resources will maintain a list of approved undergraduate Summer Session Study Abroad programs administered/sponsored by LMU.

*Amount of Tuition Remission Benefits*

Only the tuition portion of the program costs (as determined by the University) for Summer Session Study Abroad programs administered/sponsored by LMU will be credited as a tuition remission benefit. The non-tuition portion of the program fee is the responsibility of the matriculating eligible retiree. Tuition remission benefits do not cover incidental costs, such as textbooks, travel expenses, meals, *etc.* All other such costs and fees are the responsibility of the matriculating student.

For further information regarding eligible programs and benefits, please see, “Chart A – Retiree Eligibility & Tuition Remission Benefits By Type of Course”. For further clarification regarding the eligibility of courses/programs, consult Human Resources.

### **Limitations of Tuition Remission Benefits**

The following limitations apply to the tuition remission benefits policy:

- All degree/credential/certificate programs must be completed within the time frames specified in the applicable program Bulletin. In order to maintain eligibility for tuition remission benefits for a degree/credential/certificate program, students must make satisfactory progress towards a degree/credential/certificate as set forth in the appropriate Academic Bulletin.
- Tuition remission benefits are not available for some programs including, **but not limited to:** the EMBA program and LMU Extension, including the Kaplan test preparation courses.
  - See, “Chart A – Retiree Eligibility & Tuition Remission Benefits By Type of Course”. For further clarification regarding the eligibility of courses/programs, consult Human Resources.
- Eligible retirees receiving tuition remission benefits may not receive funds that are only for tuition from any other source (e.g., federal, state, University, or outside source) that, when combined with tuition remission benefits, exceed the cost of tuition. For additional information regarding the relationship between tuition remission and financial aid, please contact the Financial Aid Office at 310-338-2753.
- Tuition remission benefits may not be granted after the last day of registration of the semester or session for which benefits are claimed.

### **Academic & Financial Requirements**

An eligible retiree who is receiving tuition remission benefits must remain in strict compliance with all academic, financial and/or other University policies which may be applicable and subject to change, from time to time, at the sole discretion of the University. Failure to comply with academic, financial and/or other University policies may render the eligible retiree ineligible for the tuition remission benefits for current and/or future semesters of sessions. This ineligibility will continue for whatever period is needed to bring the eligible retiree back into compliance. During that period, the eligible retiree is responsible for all costs of his/her education.

### **Taxation of Tuition Remission Benefits**

The value of tuition remission benefits may be taxable. Eligible retirees seeking tuition remission benefits are encouraged to obtain counseling from their personal tax consultant.

### **Procedures**

To obtain tuition remission benefits, the eligible retiree must first follow admission procedures as set forth by the University. After being admitted, a Tuition Remission Form may be obtained from Human Resources. All interested eligible retirees must complete a Tuition Remission Form in order to be considered for tuition remission benefits each semester.

**Applicability of Academic Bulletins**

If, at any time, a conflict arises between the terms set forth in this policy and the terms contained in any applicable academic Bulletin, the academic Bulletin will control determination of the issue.

**Chart A – Retiree Eligibility & Tuition Remission Benefits By Type of Course**

TYPE OF COURSES	WORK STATUS	PERCENTAGE OF TUITION PAID
Undergraduate/Graduate Courses <small>(Taken pursuant to approved degree/credential/certificate program or under non-degree status)</small>	Eligible Retiree	100%
Approved <u>Semester</u> Study Abroad Programs	Eligible Retiree	Tuition portion of program costs, <b>only</b>
Approved <u>Summer</u> Session Study Abroad Programs Administered/Sponsored by LMU	Eligible Retiree	Tuition portion of program costs, <b>only</b>
EMBA Program	Eligible Retiree	No tuition remission benefits
Ed.D., LL.M. or Future Created Doctorate Programs	Eligible Retiree	No tuition remission benefits
LMU Extension	Eligible Retiree	No tuition remission benefits