

## AC 21 UNIVERSITY OF PITTSBURGH POLICY (formerly 02-07-01)

**CATEGORY:** ACADEMIC AFFAIRS  
**SECTION:** Faculty Educational Benefits  
**SUBJECT:** Employee/Spouse/Dependent Scholarships for Faculty  
**EFFECTIVE DATE:** March 1, 2011 Revised  
**PAGE(S):** 4

### POLICY

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#### I. SCOPE

This policy establishes the scholarships available under the University of Pittsburgh Benefits Program, the terms of the scholarships, and the criteria for determining the eligibility of:

- Faculty members, faculty spouses, and dependent children of faculty to receive tuition scholarships if enrolled at the University of Pittsburgh.
- Dependent children of faculty to receive tuition scholarships if enrolled at other accredited institutions.
- Dependent children of faculty to receive tuition scholarships if enrolled at Falk School.

#### II. POLICY

The University provides the following educational benefits to eligible faculty. Effective with the Spring Term, 92-2, all faculty members and their dependents receiving these benefits are classified as Pennsylvania residents for tuition assessment, with the exception of those faculty members classified as Non-Immigrant (Citizen Code FS).

##### **FACULTY SCHOLARSHIPS**

Tuition scholarships are available to all full-time faculty members, faculty librarians, research associates, chaplains, and ROTC faculty.

With the exception of the Executive MBA Program in the Joseph M. Katz Graduate School of Business, the tuition scholarship covers all tuition for the first six credits taken each term at the University of Pittsburgh, except for a charge of 3% of the tuition rate for undergraduate programs and 10% of the tuition rate for graduate programs. (To enable faculty to complete their degree through continuous enrollment, the \$5 per credit charge will be maintained for those faculty who enrolled in Fall 94-1, Spring 94-2, or Summer 94-3.) All other fees and charges are the responsibility of the student. The student must also pay the full tuition for any credits in excess of six.

Part-time faculty in the tenure stream or tenured, and part-time librarians who have been granted expectation of continued employment and who are no less than half-time, are eligible to receive a tuition scholarship proportionate to a full-time appointment.

##### **SPOUSE SCHOLARSHIPS**

Spouses of full-time faculty members, faculty librarians, and research associates are eligible for a tuition scholarship. Spouses of ROTC faculty who serve full-time on campus are also eligible.

Provided the spouse has been accepted as a degree or certificate candidate at either the undergraduate or graduate level, the terms of the scholarship are the same as those listed for faculty scholarships above except the charge is 10 % of the tuition rate for both undergraduate and graduate programs. (To enable faculty's spouses to complete their degree through continuous enrollment, the \$5 per credit charge will be maintained for those faculty's spouses who enrolled in Fall 94-1, Spring 94-2, or Summer 94-3.)

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***Proof of marriage must be furnished when applying for the scholarship.***

### **DEPENDENT CHILDREN SCHOLARSHIPS**

Within the context of the educational benefits program, the following two requirements for dependency must be met:

1. The student must be a natural, adopted, or step child of the employee.
2. The student must be listed as a child dependent on the employee's Form 1040 U.S. Individual Income Tax Return for the calendar year most applicable to the academic term for which scholarship application is being made.

***The University requires documentation to verify dependency status.***

#### **Dependent Children Attending the University of Pittsburgh**

The dependent children of full-time faculty, faculty librarians, ROTC faculty, and research associates on the University payroll are eligible for scholarships covering full undergraduate tuition at the University of Pittsburgh for 12 allowable terms. All other fees and charges are the student's responsibility.

- The scholarship covers full undergraduate tuition at the University of Pittsburgh.
- The dependent child is eligible for a maximum of 12 terms of full- or part-time study in an undergraduate program leading to a first baccalaureate degree.
- Registration for less than a full load in Fall, Spring, or Summer uses one of the 12 allowable terms. Also, dependent children attending high school and registering for courses in a term at the University use one term of the 12 allowable if they matriculate at the University.

#### **Dependent Children Attending Other Institutions Not Part of the Tuition Exchange Scholarship Program**

As of 9/1/94, this program was discontinued. However, it remains available as follows.

The University has a scholarship program for the dependent children of full-time faculty members and faculty librarians (hired by 9/1/94 or having accepted in writing an offer of employment by 9/1/94) who wish to attend an accredited college or university other than the University of Pittsburgh. Dependent children of research associates who receive an annual salary of at least \$17,500 and have been hired by 9/1/94 or have accepted in writing an offer of employment by 9/1/94 are also eligible.

Dependent children of part-time faculty in the tenure stream or tenured, and part-time faculty librarians who have been granted expectation of continued employment and who had an appointment for no less than half-time, who are retired, on disability, or deceased are eligible to receive the tuition scholarship proportionate to a full-time appointment at the University of Pittsburgh.

- Dependent children may attend any other accredited college or university as a full-time or part-time student.
- The scholarship covers tuition up to a maximum of the in-state, full-time undergraduate tuition for two terms in the College of Arts and Sciences at the Pittsburgh Campus per year for a

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maximum of four academic years.

- A student who has not used the maximum per year and wishes to attend another institution or the University of Pittsburgh for the remainder of that academic year as a full- or part-time undergraduate may have the balance applied to that tuition.
- For students transferring from another college or university to the University of Pittsburgh, each academic year at the other institution will be equivalent to two terms at the University of Pittsburgh.
- Dependent children attending high school and registering for courses at the University of Pittsburgh will have the tuition payment deducted from the maximum scholarship amount if they matriculate at another college or university.

### Falk School Scholarships

Falk School scholarships up to one quarter tuition are available to dependent children of full-time faculty members and faculty librarians.

- Operated by the School of Education, the Falk School consists of nine non-graded classes, kindergarten through eighth grade.

The children are admitted through the regular procedures of Falk School. See Procedure 09-05-16, Falk School: Tuition and Fees.

### RETIRED/SEPARATED FACULTY

Eligibility of separated, disabled, retired, or deceased faculty for the above scholarships is established by Policy 02-07-02, Effect of Separation on Eligibility for Faculty Scholarship Benefits.

### TAX WITHHOLDING ON TUITION SCHOLARSHIPS

Education benefits for employees are subject to Federal, State, and Local taxation regulations as are in effect from time to time with respect to the following:

1. Matriculation of the employee being classified as graduate level.
2. Exclusion from taxable income for educational benefits up to a maximum annual amount.
3. Exclusion from taxable income for educational benefits if certain requirements and conditions are fulfilled.

Separate regulations also apply to the following other categories of education benefits of employees:

1. An employee whose spouse's matriculation is classified at the graduate level.
2. An employee whose dependent child is enrolled at an accredited institution other than the University of Pittsburgh.

### GENERAL TERMS AND CONDITIONS

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Scholarships issued by the University are subject to review, adjustment, or cancellation for any of the following reasons:

- Change in student status
- Academic withdrawal or dismissal from the University
- Change in employment status

Scholarships are awarded regardless of the grades received in any course. However, eligibility for a scholarship does not guarantee admission to or retention in any academic program.

Scholarships are applied to tuition only; all other fees are the responsibility of the student.

Faculty who have been identified as being in default on State, Federal or institutional educational loans are not eligible for tuition remission benefits until they have provided the University with evidence that the default condition has been corrected.

### **III. REFERENCES**

Policy 02-05-02, Advanced Degrees

Policy 02-07-02, Effect of Separation on Eligibility for Faculty Scholarship Benefits

Policy 07-06-08, Domestic Partner Benefits

Policy 09-03-01, Tuition Exchange Scholarship Program

Procedure 07-06-08, Domestic Partner Benefits

Procedure 07-11-01, Employee/Spouse/Dependent Scholarships

Procedure 09-05-16, Falk School: Tuition and Fees