

University of Chicago

# **Educational Assistance Plan**

Summary of Benefits

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# Your Educational Assistance Benefits

The University of Chicago Educational Assistance Plan (the “Educational Assistance Plan”) gives you and your Dependent Children several educational assistance options, depending on your position and, in some instances, your years of consecutive employment in an eligible position at the University. If you have questions about your benefits, call the Benefits Office at 773-702-9634 or send an e-mail to [benefits@uchicago.edu](mailto:benefits@uchicago.edu).

The capitalized terms in the summary have special meaning. Please refer to the [Glossary](#) for the definitions of those capitalized terms.

## Participating in the Educational Assistance Plan

### Eligibility

You and your Dependent Children may be eligible for benefits under the Educational Assistance Plan if you are employed full-time by University of Chicago (“the University”) in one of the eligible positions listed in this document (except for the Employee Tuition Benefit at the University that is available to part-time Laboratory Schools teachers who work at least half-time, and the BSD Nursing Tuition Reimbursement Program that is available to part-time University nurses in eligible job positions who work at least 20 hours per week). Faculty members who have signed up for the Half-time Option to Retire remain eligible for the Faculty Children’s Scholarship Plan and the Laboratory Schools benefit.

Adjunct Faculty, Clinical Academics in BSD (appointed under Statute §11.2.1.2), Clinical Associates (appointed under Statute §11.2.1.3), Clinical Faculty in the SSD and PSD, all ranks of Professors of Practice in the Arts in the Division of the Humanities (appointed under Statute §11.2.7) and their Dependent Children are not eligible for the Faculty Children’s Scholarship Plan.

People appointed on or after February 1, 2010 as Research Associates, Research Associates (Instructor), Research Associate (Assistant Professor), Research Scientists, Clinical Faculty in the Law School or Booth School of Business and their Dependent Children are not eligible for the Faculty Children’s Scholarship Plan.

A listing of the eligible academic positions for the Faculty Children’s Scholarship Plan is set forth in Exhibit A on page 24 of this document.

### When Eligibility Begins

You are eligible for the benefits described for your position (see “[How Educational Assistance Works?](#)”) beginning on your first day of work at the University. However, Research Associates without rank and Research Scientists appointed before February 1, 2010 are eligible for the Faculty Children’s Scholarship Plan only after they have completed one year of full-time service. Also, eligibility for the BSD Nursing Tuition Reimbursement Program commences only after a nurse in an eligible job position has completed the six (6) month probationary period.

If your position changes and, with it, your eligibility for particular benefits under the Educational Assistance Plan, you are eligible for those new benefits beginning on the first day of the next quarter or semester following the effective date of your change in position.

### When Eligibility Ends

Your eligibility for any benefit under the Educational Assistance Plan ends when:

- You are no longer treated as employed by the University, subject to exceptions explained in the description of each of the particular types of Educational Assistance Benefits.
- The Educational Assistance Plan is terminated.
- You are no longer classified as a full-time University employee in an eligible position.

## **Applying for Benefits**

Applications for most benefits under the Educational Assistance Plan are available from the Benefits Office or our website at [humanresources.uchicago.edu](http://humanresources.uchicago.edu). Complete, sign and return the applicable form to the Benefits Office before the beginning of the course quarter or semester. More specific instructions are included in the description of each type of benefit under the Educational Assistance Plan.

Generally, requests for tuition assistance/reimbursement will not be considered after the end of the calendar year in which a course was taken.

## **Eligibility during a Leave**

### **Short-Term Disability**

If you are an employee who is eligible for the short-term disability benefit and are not actively at work due to an approved short-term disability leave, you remain eligible for the University Laboratory Schools Benefit and the Employee Child Tuition Benefit. You are not eligible for the Employee Tuition at the University or Outside of the University benefits or the BSD Nursing Tuition Reimbursement Program.

### **Family and Medical Leave**

If you are not actively at work due to an approved leave of absence under the Family and Medical Leave Act (FMLA), you remain eligible for the educational assistance for which you would have been eligible prior to your leave. The Employee Tuition at the University or Outside the University benefits and the BSD Nursing Tuition Reimbursement Program can be extended while on a Family and Medical Leave, except if you are on short-term disability.

### **Leave of Absence**

If you are not actively at work due to an approved, unpaid leave of absence, you remain eligible for the University Laboratory Schools Benefit. The maximum duration of the continuation of the University Laboratory Schools Benefit is one year. You are not eligible for any other benefits under the Educational Assistance Plan.

### **Long-Term Disability**

Generally, for the duration of the long-term disability leave, you remain eligible for the educational assistance for which you would have been eligible prior to receiving disability benefits. While you remain eligible for the University Laboratory Schools Benefit and the Employee Child Tuition Benefit, you are not eligible for the Employee Tuition at the University or Outside of the University benefits or the BSD Nursing Tuition Reimbursement Program.

### **Military Leave of Absence**

If you are in the Reserves and called for active military duty, you remain eligible for up to twenty-four (24) months for educational assistance at the same level as before your leave.

# How Educational Assistance Works

## Your Educational Assistance Benefits

The Educational Assistance Plan provides you and your family with some financial support toward the cost of education. The chart below indicates the eligible University positions for the various benefits that are available through the Education Assistance Plan. The Plan is only available to full-time University employees in these positions (with the exception of the Employee Tuition Benefit at the University available to part-time Laboratory Schools teachers who work at least half-time, and the BSD Nursing Tuition Reimbursement Program available to part-time University nurses in designated job positions who work at least 20 hours per week). There is additional information about each benefit following the chart. If your position is not listed, then you are not eligible. A listing of the eligible academic positions for the Faculty Children's Scholarship Plan is also set forth in Exhibit A on page 24 of this document.

Position	Available Benefits
<p><b>Academic Appointees (Full-time) in the following categories:</b></p> <ul style="list-style-type: none"> <li>• Faculty appointed under Statute §11.1.1, §11.1.3, §11.1.4 or §11.1.5*</li> <li>• Academic Clinician appointed under §11.2.1.1*</li> <li>• Research Associate (Associate Professor)</li> <li>• Research Associate (Professor)</li> <li>• Senior Scientist</li> <li>• Senior Research Associate</li> <li>• Senior Lecturer</li> </ul> <p><b>Academic Appointees (Full-time) appointed in the following categories before February 1, 2010</b></p> <ul style="list-style-type: none"> <li>• Research Associate (Assistant Professor)</li> <li>• Research Associate (Instructor)</li> <li>• Instructor (non-renewable)</li> <li>• Collegiate Assistant Professor</li> <li>• Law School Clinical Faculty</li> <li>• Booth School of Business Clinical Faculty</li> </ul>	<ul style="list-style-type: none"> <li>• <b>The Faculty Children's Scholarship Plan:</b> <ol style="list-style-type: none"> <li>1. For Academic Employees hired before July 1, 2004:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 85% of the University of Chicago tuition rate. The benefit is tax-free.</li> <li>○ If you are non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 100% of the University of Chicago tuition rate. The benefit is tax-free.</li> </ul> </li> <li>2. For Academic Employees hired between July 1, 2004 and June 30, 2011:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during your first four years of continuous employment. After you complete four years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first four years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the four-year period.</li> </ul> </li> <li>3. For Academic Employees hired after July 1, 2011:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during your first six years of continuous employment. After you complete six years of continuous</li> </ul> </li> </ol> </li> </ul>

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employment, you are still eligible for the same benefit, but it becomes tax-free.

- If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first six years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the six-year period.

- **The University Laboratory Schools Benefit:**

1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.
2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.

Position	Available Benefits
<p>Academic Appointees (Full-time) appointed in the following categories before February 1, 2010</p> <ul style="list-style-type: none"> <li>• Research Associate</li> <li>• Research Scientist</li> </ul>	<ul style="list-style-type: none"> <li>• <b>The Faculty Children’s Scholarship Plan (must have one or more years of full-time employment):</b> <ol style="list-style-type: none"> <li>1. For Research Associates without Rank and Research Scientists employed before July 1, 2004:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 85% of the University of Chicago tuition rate. The benefit is tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 100% of the University of Chicago tuition rate. The benefit is tax-free.</li> </ul> </li> <li>2. For Research Associates without Rank and Research Scientists hired between July 1, 2004 and June 30, 2011:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during the first four years of continuous employment. After you complete four years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition. The benefit is tax-free. During the first four years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the four-year period.</li> </ul> </li> <li>3. For Research Associates without Rank and Research Scientists hired on or after July 1, 2011:               <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during the first six years of continuous employment. After you complete six years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first six years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the six-year period.</li> </ul> </li> </ol> </li> <li>• <b>The University Laboratory Schools Benefit:</b> <ol style="list-style-type: none"> <li>1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.</li> </ol> </li> </ul>

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2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.

Position	Available Benefits
Librarian (Full-time)	<ul style="list-style-type: none"> <li>• <b>The Faculty Children’s Scholarship Plan:</b> <ol style="list-style-type: none"> <li>1. For Librarians hired before July 1, 2004: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 85% of the University of Chicago tuition rate. The benefit is tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 100% of the University of Chicago tuition rate. The benefit is tax-free.</li> </ul> </li> <li>2. Librarians hired between July 1, 2004 and June 30, 2011: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable to you during your first four years of continuous employment. After you complete four years of continuous employment, you continue to be eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first four years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the four-year period.</li> </ul> </li> <li>3. Librarians hired on or after July 1, 2011: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during your first six years of continuous employment. After you complete six years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first six years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the six-year period.</li> </ul> </li> </ol> </li> <li>• <b>The University Laboratory Schools Benefit:</b> <ol style="list-style-type: none"> <li>1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.</li> </ol> </li> </ul>

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2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.

- **Graham School of General Studies Benefit** pays 50% of tuition for you at the Graham School of General Studies, for up to two non-credit classes per quarter.

Position	Available Benefits
<p><b>Officer (Full-time)</b></p> <p>Certain positions designated as eligible per University policy before July 1, 2004 (Full-time).</p>	<ul style="list-style-type: none"> <li>• <b>The Faculty Children’s Scholarship Plan:</b> <ol style="list-style-type: none"> <li>1. For Officers and employees in designated positions hired before July 1, 2004: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 85% of the University of Chicago tuition rate. The benefit is tax-free.</li> <li>○ If you are non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 100% of the University of Chicago tuition rate. The benefit is tax-free.</li> </ul> </li> <li>2. For Officers and employees in designated positions hired between July 1, 2004 and June 30, 2011: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during your first four years of continuous employment. After you complete four years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first four years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the four-year period.</li> </ul> </li> <li>3. For Officers and employees in designated positions hired on or after July 1, 2011: <ul style="list-style-type: none"> <li>○ If you are a Highly Compensated Employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. This benefit is taxable during your first six years of continuous employment. After you complete six years of continuous employment, you are still eligible for the same benefit, but it becomes tax-free.</li> <li>○ If you are a non-highly compensated employee, your benefit is 100% of the tuition at any college, up to 75% of the University of Chicago tuition rate. The benefit is tax-free. During your first six years of continuous employment, if you become a Highly Compensated Employee, your benefit becomes taxable for the remainder of the six-year period.</li> </ul> </li> </ol> </li> <li>• <b>The University Laboratory Schools Benefit:</b> <ol style="list-style-type: none"> <li>1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.</li> </ol> </li> </ul>

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2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.

Position	Available Benefits
<p>Academic Appointees (Full-time) in the following categories:</p> <ul style="list-style-type: none"> <li>• Adjunct Faculty</li> <li>• Clinical Academic in BSD appointed under Statute §11.2.1.2*</li> <li>• Clinical Associate appointed under Statute §11.2.1.3*</li> <li>• SSD and PSD Clinical Faculty</li> <li>• Professor of Practice in the Arts in the Division of the Humanities (all ranks) appointed under Statute §11.2.7*</li> </ul> <p>Academic Appointees (Full-time) appointed in the following categories on or after February 1, 2010</p> <ul style="list-style-type: none"> <li>• Research Associate (Assistant Professor)</li> <li>• Research Associate (Instructor)</li> <li>• Research Associate</li> <li>• Research Scientist</li> <li>• Instructor (non-renewable)</li> <li>• Collegiate Assistant Professor</li> <li>• Law School Clinical Faculty</li> <li>• Booth School of Business Clinical Faculty</li> </ul>	<ul style="list-style-type: none"> <li>• <b>The University Laboratory Schools Benefit:</b> <ol style="list-style-type: none"> <li>1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.</li> <li>2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.</li> </ol> </li> <li>• <b>Employee Child Tuition Benefit</b> pays 50% of undergraduate tuition for your children at the University of Chicago.</li> </ul>

Position	Available Benefits
<p><b>Non-Academic Employees</b> All full-time staff</p>	<ul style="list-style-type: none"> <li data-bbox="776 184 1414 302">• <b>Employee Tuition Benefit at the University</b> pays 50% tuition for you at the University of Chicago for up to two undergraduate- or graduate-level for- credit courses per quarter.</li> <li data-bbox="776 338 1377 455">• <b>Employee Tuition Benefit Outside the University</b> pays 75% tuition for you at any accredited college or university up to \$2,000 per calendar year and \$26,000 lifetime.</li> <li data-bbox="776 491 1414 785">• <b>The University Laboratory Schools Benefit:</b> <ol style="list-style-type: none"> <li data-bbox="824 520 1386 611">1. Ending with the 2014/2015 Laboratory Schools academic year, the benefit pays 50% of tuition for your children attending the schools.</li> <li data-bbox="824 638 1414 785">2. Beginning with the 2015/2016 Laboratory Schools academic year, depending upon your Total Household Adjusted Gross Income, the benefit pays from 50% to 85% of tuition for your children attending the schools.</li> </ol> </li> <li data-bbox="776 821 1403 911">• <b>Employee Child Tuition Benefit</b> pays 50% of undergraduate tuition for your children at the University of Chicago.</li> <li data-bbox="776 947 1414 1085">• <b>Graham School of General Studies Benefit</b> pays 100% of tuition on <i>select, job-related</i> courses for you at the Graham School of General Studies and 50% of tuition for up to 2 credit or non-credit classes per quarter for you there.</li> </ul>

<b>Position</b>	<b>Available Benefits</b>
<p><b>Nurses</b> in BSD and CAMPUS &amp; STUDENT LIFE (CSL) in the following benefits–eligible job positions:</p> <ul style="list-style-type: none"> <li>• <b>Nurse Associate</b></li> <li>• <b>Clinical Research Nurse</b></li> <li>• <b>Clinical Research Nurse Manager</b></li> <li>• <b>Advanced Practice Nurse</b></li> <li>• <b>Advanced Practice Nurse Manager</b></li> <li>• <b>Nurse Midwife</b></li> </ul>	<ul style="list-style-type: none"> <li>• Full-time nurses in these job positions are eligible for the benefits described in the preceding page available to full-time, non-academic employees.</li> <li>• <b>BSD Nursing Tuition Reimbursement Program</b> Beginning as of May 1, 2016: <ul style="list-style-type: none"> <li>○ If you are scheduled to work 35 or more hours per week (full-time), your benefit is 100% of the tuition for a BSN, MSN or MSN/MBA or other combined nursing degree, and 75% of the tuition for a PhD in nursing or DNP.</li> <li>○ If you are scheduled to work 20-34 hours per week (part-time), your benefit is 50% of the tuition for a BSN, MSN or MSN/MBA or other combined nursing degree, and 50% of the tuition for a PhD in nursing or DNP.</li> </ul> </li> </ul>

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**University Laboratory Schools Teachers\*\***

- **Full-time Teacher on a rolling or probationary 12-month contract**
- **Full-time Teacher on a 12-month term contract**
- **Full-time Assistant Teacher**
- **Part-time Teacher who works at least half time**

- **Employee Tuition Benefit at the University** pays 50% tuition for you at the University of Chicago (including the Graham School of General Studies) for one class per quarter during the autumn, winter and spring quarters. The benefit also pays 50% tuition for Full-time Teachers on a rolling, probationary or term contract for up to three classes during the summer Quarter if you are under contract to teach full-time the following September.
- **University Laboratory Schools Benefit:** Full-time Teachers on a term contract and Full-time Assistant Teachers receive 50% tuition for your children attending the schools.

Full-time Teachers on a rolling or probationary contract pay only 15% of the tuition for your oldest child attending the schools that is not covered by the 50% contribution to that child's tuition under the benefit. However, you may have to pay only \$500 for the school year if you were hired on or before September 1, 2008 and have or had at least one child enrolled in the high school during the 2009-10 school year (contact human resources or refer to the collective bargaining agreement to see if you are eligible for this exception).

- **Employee Child Tuition Benefit** pays 50% of undergraduate tuition at the University of Chicago for Children of Full-time Teachers on rolling, probationary or term contracts.

\* *The Statutes of the University of Chicago are available on the University's website at <http://trustees.uchicago.edu/page/articles>. The Statutes are subject to change.*

\*\* *Benefits provided under the plan are established pursuant to collective bargaining and are subject to the terms of the agreement in effect at all times. Your benefits are based on your teacher status.*

## The Faculty Children's Scholarship Plan

(Please see "[How Educational Assistance Works](#)" for the list of University positions eligible for this benefit.)

### What Is Covered

The University pays undergraduate tuition benefits for your Dependent Children for either eight semesters or 12 quarters at:

- Any accredited college or university in the United States (including an accredited community or junior college that will lead to a two-year associate's degree).
- Any academically recognized foreign college or university that offers an undergraduate program leading to a bachelor's degree.

If an institution normally assesses a single comprehensive fee that covers both tuition and room and board, the institution must supply a statement to the Benefits Office indicating the portion of the comprehensive fee it treats as tuition. Any additional scholarships received from other sources, whether applicable to tuition or other college or university expenses, must be reported to the Benefits Office. The University may amend the plan in the future to deduct such awards from your benefit (please see "[Plan Amendment and Termination](#)").

The maximum benefit awarded to your child cannot exceed the undergraduate tuition in effect at the University of Chicago at the time the tuition is due and payable.

### What Is Not Covered

The Faculty Children's Scholarship Plan covers only the stated tuition charges at the educational institution. It does not include expenses such as:

- Application fees.
- Room and board charges.
- Laboratory fees.
- Activity fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

No benefit is available for certification programs in a specialized trade or for industrial schools, such as schools for aviation, cooking, auto repair, computer programming, etc. The Benefits Office and the Office of the Provost will determine whether an institution qualifies for you to receive this benefit.

### Duration of Benefit

The maximum period of this benefit is eight semesters or 12 quarters, of which four semesters or six quarters may be from a junior college. The following rules also apply:

- If your child changes from a semester program to a quarter program, each two semesters will be equal to three quarters. If your child has taken only one semester, it will be treated as two quarters.
- If your child changes from a quarter program to a semester program, each three quarters will be equal to two semesters. If your child has taken fewer than three quarters in a year, those quarters will be treated as a semester.
- If your child withdraws from an institution during a semester or quarter for which the tuition has been paid, that semester or quarter will be counted toward the maximum number of semesters or quarters covered under this plan, unless the tuition for that period is refunded to the University in full.
- Summer school courses will count as a full semester or quarter if you submit an application to the Benefits Office for the summer course(s).

**Amount and Taxability of Tuition Benefits**

The amount and taxation of benefits are determined by whether you were hired as an eligible employee before or after July 1, 2004 and whether you are deemed to be a Highly Compensated Employee.

**Eligible Employees Hired before July 1, 2004 and Who are Non-Highly Compensated**

The University pays 100% of the undergraduate tuition in effect at the University of Chicago at the time the tuition is due and payable. The benefit is tax-free.

**Eligible Employees Hired before July 1, 2004 and Who are Highly Compensated Employees**

The University pays 100% of the undergraduate tuition, up to 85% of the undergraduate tuition rate in effect at the University of Chicago at the time the tuition is due and payable. The benefit is tax-free.

**Eligible Employees Hired between July 1, 2004 and June 30, 2011 and Who are Non-Highly Compensated**

The University pays 100% of the undergraduate tuition, up to 75% of the undergraduate tuition rate in effect at the University of Chicago at the time the tuition is due and payable. The benefit is tax-free. If, however, you become a Highly Compensated Employee during your first four years of continuous employment, the benefit would be taxable for the remainder of the four-year period.

**Eligible Employees Hired between July 1, 2004 and June 30, 2011 and Who are Highly Compensated Employees**

The University pays 100% of the undergraduate tuition, up to 75% of the undergraduate tuition rate in effect at the University of Chicago at the time the tuition is due and payable. The benefit is taxable during the first four years of continuous employment. After completion of four continuous years of employment, the benefit becomes tax-free.

**Eligible Employees Hired on or after July 1, 2011 and Who are Non-Highly Compensated**

The University pays 100% of the undergraduate tuition, up to 75% of the undergraduate tuition rate in effect at the University of Chicago at the time the tuition is due and payable. The benefit is tax-free. If, however, you become a Highly Compensated Employee during your first six years of continuous employment, the benefit would be taxable for the remainder of the six-year period.

**Eligible Employees Hired on or after July 1, 2011 and Who are Highly Compensated Employees**

The University pays 100% of the undergraduate tuition, up to 75% of the undergraduate tuition rate in effect at the University of Chicago at the time the tuition is due and payable. The benefit is taxable during the first six years of continuous employment. After completion of six continuous years of employment, the benefit becomes tax-free.

If you leave University employment before completion of four or six continuous years of employment (depending on your date of hire as described above) and then come back to the University as a Highly Compensated Employee, you must complete six years of continuous employment. Your prior employment is not counted.

If you and your spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner are employed in eligible positions for this benefit by the University or University of Chicago Medical Center, only one of you can apply for the benefit.

If this benefit is for children of your civil union partner or Domestic Partner or children for whom you are legal guardian, it is taxable even if you are not a Highly Compensated Employee unless the eligible employee can claim such child as his/her Dependent Child under federal income tax law.

### **How to Apply**

Applications are available from the Benefits Office and on the website at [humanresources.uchicago.edu](http://humanresources.uchicago.edu). A completed application must be submitted for each semester or quarter that a child is attending school. In addition, you must submit an official written statement (for example, an official bill or a letter) from the institution showing tuition charges for the applicable academic year. Applications must not be submitted for any semester or quarter commencing prior to the date an employee becomes eligible for the benefit.

Tuition checks are made payable to the employee. It is the employee's responsibility to remit the tuition payment to the college or university. If the benefit is still available after the death or retirement of an employee, tuition checks are made payable to the college or university. If your child attends the University of Chicago, a check will not be issued and instead you will be charged the remaining balance, if any, of the stated tuition.

### **When Eligibility Ends**

Benefits under the Faculty Children Scholarship Plan cease when:

- You are no longer treated as employed by the University, subject to the exceptions made for certain employees at their death or retirement (see Benefit after Death or Retirement).
- Your Dependent Child marries.
- Your Dependent Child reaches age 25.
- The date the maximum duration of the benefits is reached.
- Your Dependent Child earns a bachelor's degree from any institution.
- You are no longer classified as a full-time University employee in an eligible position.

### **Benefit after Death**

If you die and at the time of your death you had been granted tenure or had been credited with at least 10 consecutive years of full-time employment in an eligible position, your Dependent Child(ren) will remain eligible for benefits under the Faculty Children Scholarship Plan in accord with the eligibility limits (see above "[When Eligibility Ends](#)").

If you die during the academic year, and had not been granted tenure or had not been credited with at least 10 consecutive years of full-time employment in an eligible position, your Dependent Children will remain eligible for benefits under the Faculty Children Scholarship Plan through the end of that academic year.

### **Benefit after Retirement**

If you retire from the University on or after age 65 with at least 15 years of consecutive service in an eligible position, your Dependent Children remain eligible for benefits under the Faculty Children Scholarship Plan if:

- On or before June 30, 2013, you were appointed under Statutes 11.1.4, 11.1.5, or 11.2.1.1;
- You sign a document certifying that you have retired and you provide certification satisfactory to the University that you are not employed, self-employed, or working as an independent contractor in a full-time capacity or in a position that is eligible for benefits commonly available to full-time employees. The relevant portion of the last Federal income tax return may be the type of documentation requested; and
- Your Dependent Children are claimed as dependent children on your tax return for the calendar year of the date of your retirement, and they remain your dependents while they are enrolled in college.

If you become employed by the University in a post-retirement benefits-ineligible position, such employment will not affect your continued eligibility.

No employee hired on or after July 1, 2013 will be eligible for the Faculty Children’s Scholarship Plan benefit in retirement.

**Taxability of Benefit after Death or Retirement**

If the eligible employee was a Highly Compensated Employee at the time of his/her death or retirement, the University will report this benefit as taxable for federal income tax purposes. It is advisable to consult a professional tax advisor regarding the tax treatment of this benefit for personal income tax purposes.

**University Laboratory Schools Benefit**

(Please see [“How Educational Assistance Works”](#) for the list of University positions eligible for this benefit.)

**What Is Covered**

Up to the conclusion of the 2014/2015 University of Chicago Laboratory Schools academic year, the University pays 50% of the tuition at the Laboratory Schools for the Dependent Children of employees in eligible positions. Beginning with the 2015/2016 academic year, the University pays between 50% to 85% of the tuition at the Laboratory Schools for the Dependent Children of employees in eligible positions. The standard benefit is 50%; however, you have the option to apply for additional tuition coverage above 50% based on your Total Household Adjusted Gross Income as reflected below.

<b>Total Household Adjusted Gross Income</b>	Under \$45,000	\$45,000 – \$74,999	\$75,000 – \$99,999	\$100,000 – \$199,999	Over \$200,000
<b>Total Tuition Coverage</b>	85%	75%	66%	60%	50%

Your “Total Household Adjusted Gross Income” is the income set forth on pages 1 and 2 of your Federal income tax return, which must be submitted to the University as part of the application process for the higher benefit (please see [“How to Apply”](#)). Total Household Adjusted Gross Income includes the applicant’s income and the income of his or her spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner. Total Household Adjusted Gross Income also includes the income of both custodial parents (i.e., non-married custodial parents).

For University Laboratory Schools Full-time Teachers on rolling or probationary contracts, you pay only 15% of the school year’s tuition for your oldest child that is not covered by the University’s 50% contribution to that child’s tuition. However, you may have to pay only \$500 for the school year if you are a Full-time Teacher on a rolling or probationary contract employed in that position on or before September 1, 2008 and had at least one child enrolled in the high school during the 2009-10 school year. Please contact human resources or refer to the collective bargaining agreement to see if you are eligible for this exception.

Your Dependent Child must be enrolled in the nursery, kindergarten, lower, middle or high school at the University’s Laboratory Schools.

If you and your spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner are employed in eligible positions for this benefit by the University or University of Chicago Medical Center, only one of you can apply for the benefit.

### **What Is Not Covered**

The University Laboratory Schools Benefit does not cover expenses such as:

- Application fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

### **How to Apply**

Applications are available from the Benefits Office and on the website:

[humanresources.uchicago.edu](http://humanresources.uchicago.edu). Complete the application and return it to the Benefits Office, along with a copy of your child's birth certificate or proof of guardianship. Once your application has been approved, you will be charged for the remaining balance of the stated tuition each quarter that your child is enrolled at the Laboratory Schools.

For those who wish to apply for a tuition benefit percentage greater than 50% (beginning with the 2015/2016 academic year) you will be required to provide a copy of your last Federal income tax return as proof of Total Household Adjusted Gross Income. You must also provide the Federal income tax return of your spouse (if you file separate returns), partner in a civil union recognized in the State of Illinois or Domestic Partner, as well as the Federal income tax return of the Child's other custodial parent. A non-custodial parent's Federal income tax return will not be considered for purposes of verifying Total Household Adjusted Gross Income. **(All income information may be redacted on submitted tax returns, except for the line showing "adjusted gross income".)**

You must reapply for the greater tuition benefit percentage for each academic year your Dependent Child is enrolled in the Laboratory Schools. A change in Total Household Adjusted Gross Income during the Laboratory Schools academic year (e.g., if due to divorce, separation, or loss of job of your spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner) will not impact that academic year's benefit amount, as the tuition benefit is established only once for an academic year. If there is a change in your Total Household Adjusted Gross Income, you may apply for a greater benefit for the following academic year.

### **Taxes**

Generally, this benefit is non-taxable for federal income tax purposes. However, tuition for children of your Domestic Partner or for children for whom you are legal guardian is taxable unless federal tax law would permit otherwise.

### **Benefit after Death or Retirement**

The University Lab School Benefit ends as of the date you are no longer treated as employed by the University with two exceptions.

- **Death.** If you die and at the time of your death you had been granted tenure or had been credited with at least 10 consecutive years of full-time employment in an eligible position, your Dependent Children remain eligible for this benefit.
- **Retirement.** If you are an Academic Employee or Officer who retires on or after age 65 with tenure or having been employed for at least 10 consecutive years in such a position at your retirement, your Dependent Children remain eligible for this benefit.

## **Employee Child Tuition Benefit**

(Please see “[How Educational Assistance Works](#)” for the list of University positions eligible for this benefit.)

### **What Is Covered**

The University pays for 50% of undergraduate tuition at the University of Chicago for up to 12 quarters for the Dependent Child(ren) of employees in eligible positions.

The maximum period of this benefit is 12 quarters. If your child withdraws from the University during a quarter for which tuition has been paid, the quarter will be counted toward the maximum unless the benefit amount is fully refunded to the University.

If you and your Spouse or Domestic Partner are employed in eligible positions for this benefit by the University or University of Chicago Medical Center, only one of you can apply for the benefit.

### **What Is Not Covered**

This benefit covers only the stated tuition charges at the University. It does not include expenses such as:

- Application fees.
- Room and board charges.
- Laboratory fees.
- Activity fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

### **How to Apply**

Applications are available from the Benefits Office and on the website: [humanresources.uchicago.edu](http://humanresources.uchicago.edu). You must complete the application and return it to the Benefits Office before the beginning of the applicable quarter. When your application is approved, you will be charged for 50% of the stated tuition.

### **Taxes**

Generally, this benefit is non-taxable for federal income tax purposes. However, tuition for children of your Domestic Partner or for children for whom you are legal guardian is taxable unless federal tax law would permit otherwise.

## **Employee Tuition Benefit at the University**

(Please see “[How Educational Assistance Works](#)”) for the list of University positions eligible for this benefit.)

### **What Is Covered**

The University pays 50% of your tuition at the University for up to two undergraduate- or graduate-level, for-credit courses per quarter. See “[The Graham School of General Studies Plan](#)” below for more information on Graham School tuition benefits.

For University Laboratory Schools teachers, the University pays for 50% of your tuition for one undergraduate or graduate course at the University (including the Graham School of General Studies) during each autumn, winter and spring quarter. If you are under contract to return to the Laboratory Schools as a Full-time Teacher on a rolling, probationary or term contract for the following September, the University will pay 50% of your tuition for up to three courses taken during the summer quarter.

To qualify, you must:

- Meet regular University admission requirements.
- Meet any course requirements.
- Maintain satisfactory performance on the job.
- Obtain prior approval from your supervisor to register for classes during working hours and agree to make up the time or take a reduction in pay. Your supervisor is not obligated to permit you to attend classes scheduled to meet during your working hours.

### **What Is Not Covered**

The Employee Tuition Benefit at the University covers only tuition charges at the University. It does not include expenses such as:

- Application fees.
- Laboratory fees.
- Activity fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

### **How to Apply**

Applications are available from the Benefits Office and on the website: [humanresources.uchicago.edu](http://humanresources.uchicago.edu). Your immediate supervisor must approve your application. Return the application to the Benefits Office before the beginning of the applicable quarter. You will then be billed for 50% of the tuition.

### **Taxes**

If this benefit is applied to undergraduate level courses, it is non-taxable for federal income tax purposes. If this benefit is applied to graduate level courses, up to \$5,250 per calendar year is non-taxable; benefits in excess of \$5,250 are taxable unless the course is job-related.

## **Employee Tuition Benefit Outside the University**

(Please see “[How Educational Assistance Works](#)” for the list of University positions eligible for this benefit.)

### **What Is Covered**

The University pays 75% of the tuition for passing a class taken toward a two-year or four-year undergraduate degree at regionally accredited colleges or universities other than the University of Chicago. You may be reimbursed up to \$2,000 per calendar year in which the class ends. The lifetime maximum benefit is \$26,000 per employee.

This benefit is intended to help employees in eligible positions earn an associate’s or bachelor’s degree. For example, if you already have an associate’s degree, courses taken towards another associate’s degree will not be reimbursed. You are not eligible for this benefit if you already possess a four-year undergraduate degree, a graduate degree or either of their equivalents from a domestic or foreign educational institution.

### **What Is Not Covered**

The Employee Tuition Benefit outside the University only covers stated tuition charges. It does not include expenses such as:

- Application fees.
- Laboratory fees.
- Activity fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

### **How to Apply**

Applications are available from the Benefits Office and on the website:

[humanresources.uchicago.edu](http://humanresources.uchicago.edu). Return the completed form to the Benefits Office with proof that you have paid for the class and received a passing grade. Reimbursement checks will be made payable to you and will be sent to you at the home address on file with the Benefits Office.

### **Taxes**

This benefit is non-taxable for federal income tax purposes.

## **The Graham School of General Studies Plan**

(Please see “[How Educational Assistance Works](#)” for the list of University positions eligible for this benefit.)

Under the Employee Tuition Benefit at the University as described above, the University pays 50% of Graham School Tuition for Non-Academic Employees for up to two classes per quarter (credit or non-credit). However, for certain select job-related courses offered at the Graham School, 100% of the tuition will be paid -- the University will pay 50% of the tuition and the Graham School of General Studies will cover the remaining half. The employee's department must also pay an administrative fee.

For Librarians, the University pays 50% of the tuition for only non-credit coursework at the Graham School for up to two classes per quarter. Librarians are not eligible for the 100% tuition benefit for job-related courses offered at the Graham School.

Classes under \$40 are not eligible for tuition remission.

### **How to Apply**

Applications are available for the Graham School at [www.grahamschool.uchicago.edu](http://www.grahamschool.uchicago.edu) or 312-464-8655.

### **Taxes**

If this benefit is applied to undergraduate level courses, it is non-taxable for federal income tax purposes. If this benefit is applied to graduate level courses, up to \$5,250 per calendar year is non-taxable; benefits in excess of \$5,250 are taxable unless the course is job-related.

## **BSD Nursing Tuition Reimbursement Program**

(Please see “[How Educational Assistance Works](#)” for the list of University positions eligible for this benefit.)

### **What Is Covered**

If you are a full-time nurse, the University pays 100% of the tuition for a Bachelor of Sciences in Nursing (“BSN”), a Master of Science in Nursing (“MSN”) or a MSN/MBA or other combined

graduate nursing degree, and 75% of the tuition for a PhD in Nursing, or a Doctor of Nursing Practice (“DNP”). If you are a part-time nurse, the University pays 50% of the tuition for a BSN, MSN or MSN/MBA or other combined graduate nursing degree, and 50% of the tuition for a PhD in Nursing, or DNP.

Nursing staff must be accepted into an accredited academic program leading to a bachelor’s, graduate or doctoral degree in nursing. Eligibility begins after a nurse has successfully completed the six (6) month probationary period, and is restricted to courses that begin after this period. Full-time nurses must first exhaust the Employee Tuition Benefit Outside the University for any coursework towards these degrees before participating in the BSD Nursing Tuition Reimbursement Program.

Eligibility for reimbursement is based on your status as a University employee at the time the application for reimbursement is approved by the University following completion of a course. Accordingly, if your employment terminates or your work hours drop below twenty (20) hours per week prior to the completion of a course, then you will not be eligible for reimbursement.

You must remain employed by the University for a period of one (1) year after completion of a course. If you voluntarily leave the University, or are terminated for cause, you will be required to return to the University some or all of the monies reimbursed to you for tuition.

University reimbursement will be reduced by any financial assistance you receive, excluding loans. Under no circumstances may the total amount of University reimbursement and other financial assistance exceed the employee’s total expense for the coursework.

### **What Is Not Covered**

The Employee Tuition Benefit outside the University only covers stated tuition charges. It does not include expenses such as:

- Application fees.
- Laboratory fees.
- Activity fees.
- Other special fees charged for particular courses or programs, required or not.
- Any other incidental fees.

### **How to Apply**

Applications are available from BSD Human Resources and on the website: <http://biologicalsciences.uchicago.edu/staff>. Return the completed form to BSD Human Resource with proof that you have paid for the course and received a passing grade. Reimbursement checks will be made payable to you and will be sent to you at your home address on file with BSD Human Resources.

### **Taxes**

If this benefit is applied to an undergraduate BSN, it is non-taxable for federal income tax purposes. If this benefit is applied to a graduate or doctoral nursing program (a MSN, MSN/MBA or other combined graduate nursing degree, PhD in Nursing, or DNP), up to \$5,250 per calendar year is non-taxable.

### **Discretionary Authority**

The University has discretionary authority to grant or deny benefits under this plan. Benefits under the plan will be paid only if the University decides in its discretion that you, the applicant, are entitled to them. The decision of the University shall not be overturned unless determined by a court of law to be arbitrary and capricious.

## **Plan Amendment and Termination**

The University has reserved the right, in its sole discretion under circumstances that it deems advisable (including, but not limited to, a need to address cost or plan design considerations), to terminate the plan or to amend or eliminate benefits. In the event of termination or amendment or elimination of benefits, the rights and obligations of participants prior to the date of such event shall remain in effect, and changes shall be prospective, except to the extent that the University's action and applicable law permit otherwise.

## **Collective Bargaining**

Certain provisions of the Educational Assistance Plan may be subject to collective bargaining agreements between the University of Chicago and certain unions.

If you are a member of a collective bargaining unit affected by these agreements, you can obtain a copy of the unit's agreement by writing to the plan administrator, or you may obtain it at the Labor Relations Office.

# Glossary

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<b>Dependent Children</b>	This includes unmarried: <ul style="list-style-type: none"><li>• Natural, step- or adopted children, children of your Domestic Partner, children for whom you are legal guardian.</li><li>• The children are covered to age 25.</li><li>• The children are covered if you are eligible to claim them as dependents on your income taxes.</li></ul>
<b>Domestic Partner</b>	Two individuals of the same gender who live together in a long-term relationship of indefinite duration, with an exclusive mutual commitment in which the partners agree to be jointly responsible for each other's common welfare and share financial obligations. The partners may not be related by blood to a degree that would prohibit legal marriage or civil union in the state in which they legally reside and may not be married to or in a civil union with any other person. Your Domestic Partner must be registered with the Benefits Office.
<b>Highly Compensated Employee</b>	A Highly Compensated Employee is defined by current IRS guidelines.

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## A Final Note

This summary is written in everyday language and provides a general summary of your educational assistance benefits. We have tried to make it as complete and accurate as possible. The University has the authority to interpret the terms of the plan and to address questions arising under the plan.

Participating in this plan does not guarantee employment.

# Exhibit A

Name of Track	Title/Rank***	Statutory Provision****
<b>The following Titles/Ranks are eligible for the Faculty Children's Scholarship Plan.</b>		
Undifferentiated BSD	Assistant Professor	11.1.3 variant
Tenure Track	Instructor	11.1.1
Tenure Track	Assistant Professor	11.1.3
Tenure Track	Associate Professor	11.1.4
Tenure Track	Professor	11.1.4
Clinical Scholar BSD	Instructor	11.1.5
Clinical Scholar BSD	Assistant Professor	11.1.5
Clinical Scholar BSD	Associate Professor	11.1.5
Clinical Scholar BSD	Professor	11.1.5
Academic Clinician BSD	Instructor	11.2.1.1
Academic Clinician BSD	Assistant Professor	11.2.1.1
Academic Clinician BSD	Associate Professor	11.2.1.1
Academic Clinician BSD	Professor	11.2.1.1
Research Associate	Research Associate (Associate Professor)	11.2.4
Research Associate	Research Associate (Professor)	11.2.4
Research Associate	Senior Research Associate	11.2.4
Research Associate	Senior Scientist	11.2.4
Lecturer	Senior Lecturer	11.2.4
Librarian	Librarian 1	11.2.6
Librarian	Librarian 2	11.2.6
Librarian	Librarian 3	11.2.6
Librarian	Librarian 4	11.2.6

<b>The following Titles/Ranks are eligible for the Faculty Children's Scholarship Plan if the appointment was made before 1 February 2010.</b>		
Research Associate	Research Associate without Rank	11.2.4
Research Associate	Research Associate (Instructor)	11.2.4
Research Associate	Research Associate (Assistant Professor)	11.2.4
Research Associate	Research Scientist	11.2.4
Instructor (non-renewable)	Instructor	11.1.1 variant
Collegiate Assistant Professor	Collegiate Assistant Professor	11.1.2
Clinical Appointment Law	Clinical Instructor	11.2.2.1
Clinical Appointment Law	Assistant Clinical Professor	11.2.2.2
Clinical Appointment Law	Associate Clinical Professor	11.2.2.3
Clinical Appointment Law	Clinical Professor	11.2.2.4
Clinical Appointment Booth	Clinical Assistant Professor	11.2.3.4
Clinical Appointment Booth	Clinical Associate Professor	11.2.3.5
Clinical Appointment Booth	Clinical Professor	11.2.3.6
<p>***Titles/Ranks that do not appear on this chart or that were made after the eligibility date are ineligible for the Faculty Children's Scholarship Plan.</p> <p>****The Statutes of the University of Chicago are available on the University website at (<a href="http://trustees.uchicago.edu/page/articles">http://trustees.uchicago.edu/page/articles</a>)</p>		

<sup>i</sup> The numbering of the Statutes changes over time. These references are to the current Statutes.