

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—Generally

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 Benefits that are available exclusively to part-time Laboratory Schools teachers who work at least half-time, and the BSD Nursing Tuition Reimbursement Program that is available exclusively 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.

#### *Eligibility—Faculty Children’s Scholarship Plan*

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), Research Assistant Professors (appointed under Statute §11.2.4.1), Lecturers, Professors from Practice in the Law School (appointed under Statute §11.2.2.6), Collegiate Assistant Professors, Instructors and their Dependent Children are not eligible for the Faculty Children’s Scholarship Plan.

Individuals 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.

Individuals appointed on or after March 1, 2017 as Senior Research Associates 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 at the end 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. 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 the [UChicago Intranet](#). Complete, sign and return the applicable form to the Benefits Office as instructed in the “How to Apply” sections 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, Diverse Learners Tuition Portability 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 and the Diverse Learners Tuition Portability Benefit. The maximum duration of the continuation of the University Laboratory Schools Benefit or Diverse Learners Tuition Portability 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 (i.e., for so long as your status in Workday is “active employee” for benefits purposes), 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, Diverse Learners Tuition Portability 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 charts on the following pages indicate 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 exclusively to part-time Laboratory Schools teachers who work at least half-time, and the BSD Nursing Tuition Reimbursement Program available exclusively 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 charts. 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 at the end of this document.

## Position

Academic Appointees (Full-time) in the following categories:

- Faculty appointed under Statute §11.1.1, §11.1.3, §11.1.4 or §11.1.5\*
- Academic Clinician appointed under §11.2.1.1\*
- Research Associate (Associate Professor)\*\*
- Research Associate (Professor)\*\*
- Senior Scientist\*\*
- Research Professor
- Research Associate Professor
- Senior Lecturer (all classifications) appointed under §11.2.4.2.2

## Available Benefits

- **The Faculty Children's Scholarship Plan:**
  1. For Academic Appointees hired before July 1, 2004:
    - 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.
    - 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.
  2. For Academic Appointees hired between July 1, 2004 and June 30, 2011:
    - 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.
    - 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.
  3. For Academic Appointees hired after July 1, 2011:
    - 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.
    - 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** pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.
- **The Diverse Learners Tuition Portability Benefit** for each of your Dependent Children attending certain Covered Schools pays an amount equal to the tuition remission benefit you would be eligible to receive under the Laboratory Schools Benefit (up to 100% of Covered School tuition).
- **The Summer Session Tuition Benefit** pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.

## Position

Academic Appointees (Full-time) appointed in the following categories before February 1, 2010:

- Research Associate (Assistant Professor)\*\*
- Research Associate (Instructor)\*\*
- Research Associate
- Research Scientist
- Law School Clinical Faculty
- Booth School of Business Clinical Faculty

## Available Benefits

- **The Faculty Children's Scholarship Plan (must have one or more years of full-time employment):**
  1. For Research Associates without Rank and Research Scientists employed before July 1, 2004:
    - 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.
    - 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.
  2. For Research Associates without Rank and Research Scientists hired between July 1, 2004 and January 31, 2010:
    - 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.
    - 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.
- **The University Laboratory Schools Benefit** pays at least 50% of tuition for your Dependent Children attending the schools depending on your Total Household Adjusted Gross Income.
- **The Diverse Learners Tuition Portability Benefit** for each of your Dependent Children attending certain Covered Schools pays an amount equal to the tuition remission benefit you would be eligible to receive under the Laboratory Schools Benefit (up to 100% of Covered School tuition).
- **The Summer Session Tuition Benefit** pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.



## Position

Academic Appointees (Full-time) appointed in the following category before March 1, 2017:

- Senior Research Associate

## Available Benefits

- **The Faculty Children's Scholarship Plan:**
  1. For Academic Appointees hired before July 1, 2004:
    - 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.
    - 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.
  2. For Academic Appointees hired between July 1, 2004 and June 30, 2011:
    - 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.
    - 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.
  3. For Academic Appointees hired on or after July 1, 2011:
    - 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.
    - 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** pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.
- **The Diverse Learners Tuition Portability Benefit** for each of your Dependent Children attending certain Covered Schools pays an amount equal to the tuition remission benefit you would be eligible to receive under the Laboratory Schools Benefit (up to 100% of Covered School tuition).
- **The Summer Session Tuition Benefit** pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.

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> pays at least 50% of tuition for your Dependent Children attending the schools depending on your Total Household Adjusted Gross Income.</li> <li>• <b>Employee Tuition Benefit at the University (Graham and UCPE only):</b> The University pays 50% of tuition for you up to two courses (non-credit or credit) per quarter at the Graham School or UChicago Professional Education (UCPE).</li> <li>• <b>The Diverse Learners Tuition Portability Benefit</b> for each of your Dependent Children attending certain Covered Schools pays an amount equal to the tuition remission benefit you would be eligible to receive under the Laboratory Schools Benefit (up to 100% of Covered School tuition).</li> <li>• <b>The Summer Session Tuition Benefit</b> pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.</li> </ul>

Position	Available Benefits
<p><b>Officer (Full-time)</b></p> <p><b>Certain positions designated as eligible per University policy before July 1, 2004 (Full-time).</b></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> pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.</li> <li>• <b>The Diverse Learners Tuition Portability Benefit</b> for each of your Dependent Children attending certain Covered Schools pays an amount equal to the tuition remission benefit you would be eligible to receive under the Laboratory Schools Benefit (up to 100% of Covered School tuition).</li> <li>• <b>The Summer Session Tuition Benefit</b> pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.</li> </ul>

Position	Available Benefits
<p><b>Academic Appointees (Full-time)</b> in the following categories:</p> <ul style="list-style-type: none"> <li>• <b>Adjunct Appointees</b></li> <li>• <b>Clinical Academic in BSD appointed under Statute §11.2.1.2*</b></li> <li>• <b>Clinical Associate appointed under Statute §11.2.1.3*</b></li> <li>• <b>PSD Clinical Appointees appointed under §11.2.8*</b></li> <li>• <b>SSD Clinical Appointees appointed under §11.2.9*</b></li> <li>• <b>Research Assistant Professor appointed under Statute §11.2.4.1*</b></li> <li>• <b>Professor from Practice in the Law School appointed under §11.2.2.6*</b></li> </ul> <p><b>Academic Appointees (Full-time)</b> appointed in the following categories on or after February 1, 2010:</p> <ul style="list-style-type: none"> <li>• <b>Research Associate (Assistant Professor)**</b></li> <li>• <b>Research Associate (Instructor)**</b></li> <li>• <b>Research Associate</b></li> <li>• <b>Research Scientist</b></li> <li>• <b>Law School Clinical Faculty</b></li> <li>• <b>Booth School of Business Clinical</b></li> </ul> <p><b>Academic Appointees (Full-time)</b> appointed in the following category on or after March 1, 2017:</p> <ul style="list-style-type: none"> <li>• <b>Senior Research Associate</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>The University Laboratory Schools Benefit</b> pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.</li> <li>• <b>Employee Child Tuition Benefit</b> pays 50% of undergraduate tuition for your Dependent Children at the University of Chicago.</li> <li>• <b>The Summer Session Tuition Benefit</b> pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.</li> </ul>

## Position

**Academic Appointees** covered by a collective bargaining agreement with SEIU Local 73 and appointed in the following job titles:\*\*\*

- **Assistant Instructional Professor, Associate Instructional Professor, or Instructional Professor (referred to as “Lecturer” in the CBA);**
- **Professor of Practice in the Arts in the Division of the Humanities;**
- **Teaching Fellows;**
- **Lecturer 2; and**
- **Collegiate Assistant Professor**

## Available Benefits

- **The University Laboratory Schools Benefit** pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.
- **Employee Child Tuition Benefit** pays 50% of undergraduate tuition for your Dependent Children at the University of Chicago.

Position	Available Benefits
<p><b>Non-Academic Employees</b>  <b>All full-time staff</b></p>	<ul style="list-style-type: none"> <li>• <b>The University Laboratory Schools Benefit</b> pays at least 50% of tuition for your Dependent Children attending the schools depending upon your Total Household Adjusted Gross Income.</li> <li>• <b>Employee Tuition Benefit at the University</b> pays 50% tuition for you at the University of Chicago (including at the Graham School and UCPE) for up to two undergraduate- or graduate-level courses per quarter.</li> <li>• <b>Employee Tuition Benefit Outside the University</b> pays 75% of undergraduate tuition for you at any accredited college or university up to \$2,000 per calendar year and \$26,000 lifetime.</li> <li>• <b>Employee Child Tuition Benefit</b> pays 50% of undergraduate tuition for your Dependent Children at the University of Chicago.</li> <li>• <b>The Summer Session Tuition Benefit</b> pays 25% tuition for your Dependent Children for up to two eligible Summer Session courses.</li> </ul>

## Position

**Nurses in BSD and CAMPUS & STUDENT LIFE (CSL)** in the following benefits-eligible job positions:

- **Advanced Practice Provider, Manager**
- **Advanced Practice Provider, Specialist**
- **Advanced Practice Provider, Sr. Analyst**
- **Nursing, Sr. Manager**
- **Nursing, Manager**
- **Nursing, Sr. Specialist**
- **Nursing, Specialist**
- **Nursing, Sr. Analyst**
- **Nursing, Analyst**

## Available Benefits

- Full-time nurses in these job positions are eligible for the same available benefits as those listed as available benefits for full-time, non-academic employees above.
- BSD Nursing Tuition Reimbursement Program as of May 1, 2016:
  - 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.
  - 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.

Position	Available Benefits
<b>University Laboratory Schools Teachers***</b> <ul style="list-style-type: none"> <li>• Full-time Head Teacher on a rolling or probationary 12-month contract</li> <li>• Full-time Teacher on a 12-month term contract</li> <li>• Full-time Assistant Teacher</li> <li>• Part-time Teacher who works at least half time</li> </ul>	<ul style="list-style-type: none"> <li>• For all current benefits and terms, Laboratory Schools employees covered by the collective bargaining agreement with AFT Local 2063 should refer to their collective bargaining agreement.</li> </ul>

\* The Statutes of the University of Chicago are available on the University's [website](#). The Statutes are subject to change.

\*\* This title/rank no longer exists for new appointments.

\*\*\* 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. You can obtain a copy of the applicable collective bargaining agreement by visiting the [Collective Bargaining Agreements](#) site.



# 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 per child, 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 of Chicago.
- If you submit an application for your child's Summer, January, or other interim or shortened academic term, it will count as one of the 12 quarters or 8 semesters allowed under this policy.

### **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. In addition, if this benefit is for Dependent Children who are children of your civil union partner or Domestic Partner or for Dependent Children for whom you are legal guardian, it is taxable unless the eligible employee can claim such child as their dependent on their federal income tax return.

### **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.

For families with multiple employees in eligible positions for this benefit, the benefit may be claimed by only one employee per child at a time. For clarity, the maximum duration of the benefit is calculated at the child level and cannot be aggregated across multiple eligible employees in a family for a given child.

### **How to Apply**

Applications are available from the Benefits Office and on the [UChicago Intranet](#). 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. Applications must be submitted no later than the last day of the semester or quarter for which the benefit is being requested.

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's 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's 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's 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's Scholarship Plan if:

- On or before June 30, 2013, you were appointed under Statutes 11.1.4, 11.1.5, or 11.2.1.1i;
- 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 can be 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

The University pays a portion of the tuition at the Laboratory Schools for the Dependent Children of employees in eligible positions. Laboratory Schools employees covered by the collective bargaining agreement with AFT Local 2063 should refer to their collective bargaining agreement for the current benefits and terms.

### *Benefit for Autumn, Winter and Spring Quarters*

For households with a Total Adjusted Gross Income (“AGI”) of \$250,000 or more, the standard benefit is 50% tuition remission for each child attending the Laboratory Schools. In addition, families with more than one child attending the Laboratory Schools can apply to have the tuition obligation for each additional child attending the Laboratory Schools further reduced by \$2,000 (the “sibling discount”).

Households with an AGI of less than \$250,000 can apply to receive an enhanced tuition remission benefit for their first child attending the Laboratory Schools such that the tuition obligation is equal to 6.4% of the mean AGI associated with the household’s applicable AGI bracket (see the AGI Bracket table at the end of this Section). For example, a family with an AGI between \$80,000 and \$84,999 will pay 6.4% of \$82,500 for the first child attending the Laboratory Schools; the balance of the student’s tuition will be covered through tuition remission. For households with an AGI of less than \$250,000 that have more than one child attending the Laboratory Schools, the tuition obligation for each additional child will be equal to the lesser of (i) 6.4% of the mean AGI for the applicable bracket minus \$2,000 or (ii) the 50% tuition rate minus \$2,000. For example, if a household with an AGI of \$196,000 in academic year 2020-2021 has one child attending grade 3 and the other child attending half-day nursery school (N3), the tuition obligation for the first child in 3<sup>rd</sup> grade would be \$12,640 (i.e., 6.4% of \$197,500) and instead of paying \$10,640 (\$12,640 minus \$2,000) for the child in N3, the tuition obligation for the second child would be \$9,939.50 (50% of the 2020-21 N3 half-day full tuition rate of \$23,879 minus \$2,000).

***You must apply through [Workday](#) each year to receive the standard benefit, the enhanced tuition remission benefit (for households with AGI of less than \$250,000) and the sibling discount (regardless of household AGI). (See “[How to Apply](#)” for further details).***

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. 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. In the case of Lab students whose custodial parents are divorced and one or both have remarried and file as “married filing jointly” the custodial parent with the higher Total Household Adjusted Gross Income will determine the amount of the benefit. In the case of Lab students whose custodial parents are divorced and neither custodial parent has remarried, or one or both have remarried but file as “married filing separately”, the custodial parents’ AGIs will be combined for purposes of determining the benefit amount. In the case of Lab students whose custodial parents have never married and who file separate federal income tax returns, the custodial parents’ AGIs will be combined for purposes of determining the benefit. A non-custodial parent’s Federal income tax return will not be considered for purposes of verifying Total Household Adjusted Gross Income.

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

For families with multiple employees in eligible positions for this benefit, the benefit may be claimed by only one employee per child at a time.

### *Benefit for Summer Quarter—High School Summer Courses Taken For Credit*

Employees and Dependent Children who are eligible to receive the University Laboratory Schools Benefit during the Autumn, Winter and Spring quarters in an academic year are also eligible to receive a 50% tuition remission on Laboratory Schools high school courses taken for credit over the summer quarter by their Dependent Child(ren). The high school summer course benefit does not vary with AGI and does not include a sibling discount as described above. Please contact the Benefits Office for an application form specific to Lab Summer Courses.

### **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 by logging into Workday (via <https://workday.uchicago.edu/>). **You must complete the application in Workday, including any required supporting documentation, no later than the June 15 prior to the academic year for which the benefit will be applied.** For mid-year enrollments, employees must generally apply prior to the due date of their first tuition bill for the newly enrolled child. 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%, you will be required to provide a copy of your last Federal income tax return as proof of Total Household Adjusted Gross Income. Please see [“What is Covered”](#) for details on what tax return information can be provided for children whose parents are divorced or are unmarried. **(All income information may be redacted on submitted tax returns, except for your name, the names of your dependents, and the line showing “adjusted gross income.”)**

A mid-year change in your total household 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 income, you may apply for a greater benefit for the following academic year.

Laboratory Schools employees covered by the collective bargaining agreement with AFT Local 2063 must apply through Workday for either (a) the tuition remission benefit outlined in their CBA or (b) the enhanced tuition remission benefit. Once covered Laboratory Schools employees select either (a) or (b) for a given year, they cannot apply for a different benefit until the following academic year.

### **Taxes**

Generally, this benefit is non-taxable for federal income tax purposes. However, tuition for Dependent Children who are children of your civil union partner or Domestic Partner or for Dependent Children for whom you are legal guardian is taxable unless federal income 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 Appointee or Officer who retires (i) on or after age 65 with tenure or (ii) having been employed for at least 10 consecutive years in such a position at your retirement, your Dependent Children remain eligible for this benefit.

**Table: Tuition Obligation Based on Total Household Adjusted Gross Income (AGI)**

Total Household Adjusted Gross Income (AGI)		6.4% of AGI
Minimum AGI	Maximum AGI	
\$0	\$4,999	\$160
\$5,000	\$9,999	\$480
\$10,000	\$14,999	\$800
\$15,000	\$19,999	\$1,120
\$20,000	\$24,999	\$1,440
\$25,000	\$29,999	\$1,760
\$30,000	\$34,999	\$2,080
\$35,000	\$39,999	\$2,400
\$40,000	\$44,999	\$2,720
\$45,000	\$49,999	\$3,040
\$50,000	\$54,999	\$3,360
\$55,000	\$59,999	\$3,680
\$60,000	\$64,999	\$4,000
\$65,000	\$69,999	\$4,320
\$70,000	\$74,999	\$4,640
\$75,000	\$79,999	\$4,960
\$80,000	\$84,999	\$5,280
\$85,000	\$89,999	\$5,600
\$90,000	\$94,999	\$5,920
\$95,000	\$99,999	\$6,240
\$100,000	\$104,999	\$6,560
\$105,000	\$109,999	\$6,880
\$110,000	\$114,999	\$7,200
\$115,000	\$119,999	\$7,520
\$120,000	\$124,999	\$7,840

Total Household Adjusted Gross Income (AGI)		6.4% of AGI
Minimum AGI	Maximum AGI	
\$125,000	\$129,999	\$8,160
\$130,000	\$134,999	\$8,480
\$135,000	\$139,999	\$8,800
\$140,000	\$144,999	\$9,120
\$145,000	\$149,999	\$9,440
\$150,000	\$154,999	\$9,760
\$155,000	\$159,999	\$10,080
\$160,000	\$164,999	\$10,400
\$165,000	\$169,999	\$10,720
\$170,000	\$174,999	\$11,040
\$175,000	\$179,999	\$11,360
\$180,000	\$184,999	\$11,680
\$185,000	\$189,999	\$12,000
\$190,000	\$194,999	\$12,320
\$195,000	\$199,999	\$12,640
\$200,000	\$204,999	\$12,960
\$205,000	\$209,999	\$13,280
\$210,000	\$214,999	\$13,600
\$215,000	\$219,999	\$13,920
\$220,000	\$224,999	\$14,240
\$225,000	\$229,999	\$14,560
\$230,000	\$234,999	\$14,880
\$235,000	\$239,999	\$15,200
\$240,000	\$244,999	\$15,520
\$245,000	\$249,999	\$15,840

# 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.

For families with multiple employees in eligible positions for this benefit, the benefit may be claimed by only one employee per child at a time. For clarity, the maximum duration of the benefit is calculated at the child level, and cannot be aggregated across multiple eligible employees in a family for a given child.

## 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 [UChicago Intranet](#). 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 Dependent Children who are children of your civil union partner or Domestic Partner or for Dependent Children for whom you are legal guardian is taxable unless federal income 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

For Non-Academic Employees: The University pays 50% of your tuition at the University for up to two undergraduate- or graduate-level courses per quarter; including courses offered by the Graham School and UChicago Professional Education (UCPE). See below for more information.

For Librarians (full-time): The University pays 50% of your tuition for up to two undergraduate- or graduate-level courses per quarter offered by the Graham School and UCPE.

For University Laboratory Schools teachers: The University pays for 50% of your tuition for one undergraduate or graduate course at the University, 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. As part of this benefit, the University pays 50% (or more, with approval by the employee's department) of tuition for you up to two courses (non-credit or credit) per quarter at the Graham School.

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.

The Employee Tuition Benefit does not include International Graham Travel Study programs.

## How to Apply

**For Graham School** – To apply for tuition benefits at the Graham School of Continuing Liberal and Professional Studies, please complete [this form](#). A separate form must be completed for each class and submitted at least ten (10) days before the course start date. Please contact the Graham Registrar at 773-702-7249 or [GrahamRegistrar@uchicago.edu](mailto:GrahamRegistrar@uchicago.edu) with any questions. [on UCPE's Employee Resources page](#).

**For UChicago Professional Education (UCPE)** – Course and registration information are available on [on UCPE's Employee Resources page](#). Registration must be completed at least ten (10) days before the course start date. For assistance, please contact the UCPE Registrar at [UChicagoEmployeeRegistration@uchicago.edu](mailto:UChicagoEmployeeRegistration@uchicago.edu) with the subject title: Employee Course Registration Inquiry or please call 773-834-2964.

**For all other courses** – Applications are available from the Benefits Office and on the [UChicago Intranet](#). Your immediate supervisor must approve your application. Return the application to the Benefits Office within the first two weeks of the 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 [UChicago Intranet](#). Return the completed form to the Benefits Office within 30 days of the end of your semester 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 Continuing Liberal and Professional Studies—Harper Pass Program

The University of Chicago Graham School offers a broad variety of continuing education courses for those seeking lifelong learning opportunities. Courses are offered either online or in-person. The non-credit programs available under the Harper Pass Program can be pursued either online or in-person.

## What Is Covered and Who is Eligible—Employees

The Graham School is providing certain Harper Pass Eligible Employees (defined below) a 50% tuition discount on its non-credit course offerings. Harper Pass Eligible Employees are listed as follows:

- Academic Appointees (Full-Time)
- Non-Academic Employees (Part-Time)
- Postdoctoral Scholars
- Temporary Workers employed directly by the University

Please note that the Harper Pass Eligible Employees listed above (other than Academic Appointees) are not eligible for employee benefit plans associated with full-time, benefits eligible status. Non-Academic Employees (Full-Time), Librarians (Full-Time) and University Laboratory Schools Teachers who are eligible for the Graham School tuition discount described on page 24 are not eligible for the Harper Pass Program.

## What Is Covered and Who is Eligible—Family Members

In addition, the Graham School is providing certain Harper Pass Eligible Family Members (defined below) a 20% tuition discount on its non-credit course offerings. Harper Pass Eligible Family Members are individuals who are not employed by the University and are related to the University employee as follows:

- Spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner, or a Dependent Child, in each case of a Harper Pass Eligible Employee
- Spouse, partner in a civil union recognized by the State of Illinois or Domestic Partner, or a Dependent Child of, in each case, a full-time University employee holding one of the eligible positions listed in this Educational Assistance Plan

## What Is Not Covered

The Harper Pass Program discount only covers stated tuition charges. It does not include other fees or expenses associated with the course. *International Graham Travel Study programs are not eligible for the Harper Pass Program.*

## How to Apply

Harper Pass Eligible Employees and Eligible Family Members may apply for the Harper Pass discount by completing [this form](#). Applications must be submitted ten (10) days prior to the first day of the course in order to request the discount. A new submission is required for each quarter. Once submitted, eligibility will be verified based on employment records for employees and documentation establishing proof of relationship in the case of family members.

## Taxes—Employees

For Harper Pass Eligible Employees, if the 50% Harper Pass discount is applied to undergraduate level courses, it is non-taxable for federal income tax purposes. If this discount 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 determined to be job-related.

## Taxes—Family Members

For Harper Pass Eligible Family Members, the 20% Harper Pass discount is non-taxable for federal income tax purposes.

# **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 a Master of Science in Nursing (“MSN”) or an 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.
- Books.
- 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](#). Return the completed form to BSD Human Resources 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 (an MSN, MSN/MBA or other combined graduate nursing degree, PhD in Nursing, or DNP), up to \$5,250 per calendar year is non- taxable.

## Diverse Learners Tuition Portability Benefit

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

### Additional Residency Requirement

In addition to being employed in an eligible position, to be eligible for the Diverse Learners Tuition Portability Benefit your primary residence must be located in one of the following nine mid-South Side neighborhoods: Douglas, Grand Boulevard, Greater Grand Crossing, Hyde Park, Kenwood, Oakland, South Shore, Washington Park, and Woodlawn (each, a “Designated Neighborhood”).

### What Is Covered

The Diverse Learners Tuition Portability Benefit is a taxable benefit available to eligible employees who have children enrolled at [City Elementary](#), [Hyde Park Day School](#), or [Wolcott College Prep](#) (each, a “Covered School”). The benefit amount is equal to the amount of tuition remission you would have received if your child(ren) attended the Laboratory Schools (not to exceed the tuition rate at the child’s Covered School). See the [University Laboratory Schools Benefit](#) for additional details regarding the standard benefit, enhanced benefit, and sibling discount. The diverse learners benefit amount for a school year is paid to the employee in two equal installments in September and January. If an employee applies for the benefit during the mid-year application cycle (i.e., applies as of December 1) the employee will be eligible to receive 50% of the benefit for the year. See [“How to Apply”](#) for further details.

For those who wish to apply for the AGI-enhanced tuition benefit, 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. 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. In the case of students whose custodial parents are divorced and one or both have remarried and file as “married filing jointly” the custodial parent with the higher Total Household Adjusted Gross Income will determine the amount of the benefit. In the case of students whose custodial parents are divorced and neither custodial parent has remarried, or one or both have remarried but file as “married filing separately”, the custodial parents’ AGIs will be combined for purposes of determining the benefit amount. In the case of students whose custodial parents have never married and who file separate federal income tax returns, the custodial parents’ AGIs will be combined for purposes of determining the benefit. A non-custodial parent’s Federal income tax return will not be considered for purposes of verifying Total Household Adjusted Gross Income.

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

### How to Apply

Applications are available [at this link](#) and on the [UChicago Intranet’s Benefit Plan Documents](#) site: Complete the application form and attach any required documents listed on the application form. Completed applications should be submitted by August 1. If you cannot submit your application by August 1, please contact the Benefits Office at [benefits@uchicago.edu](mailto:benefits@uchicago.edu). Eligible employees should not submit a diverse learners benefit application for any child(ren) whose enrollment is not yet confirmed at one of the three Covered Schools. As soon as the child(ren)’s enrollment for the upcoming academic year is finalized, eligible employees should submit an application on behalf of the newly enrolled child/children. For those who wish to apply for the AGI-enhanced tuition benefit, you will be required to provide a copy of your last Federal income tax return as proof of Total Household Adjusted Gross Income. Please see [“What is Covered”](#) for details on what tax return information can be provided for children whose parents are divorced or are unmarried. **(All income information may be redacted on submitted tax returns, except for your name, the names of your dependents, and the line showing “adjusted gross income.”)**

You must reapply for the Diverse Learners Tuition Portability Benefit for each school year your Dependent Child is

enrolled in a Covered School. A change in your total household income during the school 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 year's benefit amount, as the tuition benefit is established only once for a school year. If there is a reduction in your total household income, such that you qualify for a greater benefit, you may apply for it the following school year.

Eligibility for the Diverse Learners Tuition Portability Benefit ends as of the date you are no longer employed in an eligible position or your primary residence ceases to be located in a Designated Neighborhood.

### **Taxes**

This benefit is taxable for federal income tax purposes.

## Summer Session Benefit

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

### What Is Covered

The University pays 25% of the tuition cost for Dependent Children of employees in eligible positions for up to two courses offered by the College’s Summer Session Programs. Each January, the Summer Session Office will identify the specific Summer Session Programs for which this benefit will apply for the upcoming summer (i.e., not all Summer Session courses are eligible for the tuition benefit and eligible courses are subject to change year to year).

For families with multiple employees in eligible positions for this benefit, the benefit may be claimed by only one employee per child at a time.

The Summer Session Benefit ends as of the date you are no longer treated as employed by the University.

### What Is Not Covered

The Summer Session 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

Instructions, deadlines, and required forms to apply for this benefit are available through the Summer Session Office and on the website: <https://college.uchicago.edu/academics/summer-session-tuition-benefit-program>. These forms will require proof of Dependent Child status. Once your benefit request has been approved, you will be charged for the remaining balance of the stated tuition for up to two courses in which your Dependent Child is enrolled at Summer Session.

You must reapply for the benefit for each year your Dependent Child participates in Summer Session.

### Taxes

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



## **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 amendment or elimination of benefits or in the event of termination of the plan, 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 express terms of the Educational Assistance Plan (as amended), the University's action or 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 applicable collective bargaining agreement by visiting the [Collective Bargaining Agreements](#) site.

## Glossary

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<b>Dependent Children</b>	<p>An individual (i) who is the natural, step- or adopted child of you, your civil union partner, or your same-sex Domestic Partner or (ii) for whom you are legal guardian; and who is</p> <ul style="list-style-type: none"><li>○ unmarried;</li><li>○ under age 25; and</li><li>○ eligible to be claimed as a dependent on your or your civil union partner's or Domestic Partner's income tax return.</li></ul>
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<b>Domestic Partner</b>	<p>Two individuals of the same sex 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 same-sex Domestic Partner must be registered with the University on or before December 31, 2016.</p>
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<b>Highly Compensated Employee</b>	<p>A Highly Compensated Employee is defined by current IRS guidelines.</p>
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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

The following Titles/Ranks are eligible for the Faculty Children's Scholarship Plan.

Name of Track	Title/Rank***	Statutory Provision****
<b>Tenure Track</b>	Instructor	<b>11.1.1</b>
<b>Tenure Track</b>	Assistant Professor	<b>11.1.3</b>
<b>Tenure Track</b>	Associate Professor	<b>11.1.4</b>
<b>Tenure Track</b>	Professor	<b>11.1.4</b>
<b>Clinical Scholar BSD</b>	Instructor	<b>11.1.5</b>
<b>Clinical Scholar BSD</b>	Assistant Professor	<b>11.1.5</b>
<b>Clinical Scholar BSD</b>	Associate Professor	<b>11.1.5</b>
<b>Clinical Scholar BSD</b>	Professor	<b>11.1.5</b>
<b>Academic Clinician BSD</b>	Instructor	<b>11.2.1.1</b>
<b>Academic Clinician BSD</b>	Assistant Professor	<b>11.2.1.1</b>
<b>Academic Clinician BSD</b>	Associate Professor	<b>11.2.1.1</b>
<b>Academic Clinician BSD</b>	Professor	<b>11.2.1.1</b>
<b>Research Associate</b>	Research Associate (Associate Professor)	<b>11.2.4**</b>
<b>Research Associate</b>	Research Associate (Professor)	<b>11.2.4**</b>
<b>Research Associate</b>	Senior Scientist	<b>11.2.4**</b>
<b>Research Appointee</b>	Research Associate Professor	<b>11.2.4.1</b>
<b>Research Appointee</b>	Research Professor	<b>11.2.4.1</b>
<b>Lecturer</b>	Senior Lecturer (all classifications)	<b>11.2.4.2.2</b>
<b>Librarian</b>	Librarian 1	<b>11.2.6</b>
<b>Librarian</b>	Librarian 2	<b>11.2.6</b>
<b>Librarian</b>	Librarian 3	<b>11.2.6</b>
<b>Librarian</b>	Librarian 4	<b>11.2.6</b>

The following Titles/Ranks are eligible for the Faculty Children's Scholarship Plan if the appointment was made before February 1, 2010.

Name of Track	Title/Rank***	Statutory Provision****
Research Appointee	Research Associate without Rank	11.2.4.1
Research Associate	Research Associate (Instructor)	11.2.4**
Research Associate	Research Associate (Assistant Professor)	11.2.4**
Research Associate	Research Scientist	11.2.4.1
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

The following Titles/Ranks are eligible for the Faculty Children's Scholarship Plan if the appointment was made before 1 March, 2017.

Name of Track	Title/Rank***	Statutory Provision****
Research Appointee	Senior Research Associate	N/A

\*\* This title/rank no longer exists for new appointments.

\*\*\* 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.

\*\*\*\* The Statutes of the University of Chicago are available on the University [website](#).

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