

TUITION WAIVER GUIDE

**UNC CHARLOTTE
LEARNING & ORGANIZATIONAL
DEVELOPMENT**

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Introduction

This guide outlines the official policies, eligibility requirements, and procedural steps governing the Tuition Waiver Program for UNC Charlotte employees and their managers.

Help

If you have **technical** questions about the online tuition waiver in **Banner Self Service**, contact help@charlotte.edu or submit a [Help Ticket](#).

For answers to Frequently Asked Questions about tuition waivers, visit the [HR Connect Knowledge Base](#).

If you have questions about the **Tuition Waiver Program** (ie. the policies, process, and/or procedures), visit [Learning & Organizational Development](#) or submit a case through [HR Connect](#).

Tuition Waiver vs. Tuition Reimbursement

The University offers many options for employees to complete college-level coursework. Employees in full-time, permanent positions are granted three (3) tuition waivers per academic year. Additionally, departments may choose to pay for an employee's tuition using the Learning and Development Financial Assistance Program (tuition reimbursement). If you are interested in learning more about the difference between tuition waivers and tuition reimbursement, visit the [What's the difference between tuition waiver and Learning and Development Financial Assistance Program \(tuition reimbursement\)?](#) Knowledge Article. If you are interested in learning more about Tuition Reimbursement programs, visit the Employee [Learning and Development Financial Assistance Program](#) Knowledge Article.

Tuition Waiver Process

Employee requests for tuition waivers are submitted online in Banner Self Service as illustrated below.

Explore		Visit the UNC System Program and Degree Finder to explore your options.
Apply		Submit an application to the UNC institution of your choice through their admissions process and be accepted.
Choose		Determine which courses you wish to take according to the tuition waiver use policy and discuss your course schedule with your manager.
Register		After you have been accepted, register for your course(s).
Submit		Submit a UNC Charlotte online Tuition Waiver application so your manager can approve the waiver.

Introduction

This section of the guide describes the policies associated with the UNC Charlotte Tuition Waiver Program. “Policies” are defined as pre-established rules, regulations, protocols, or statutes for which non-compliance results in consequences.

Employee Eligibility Requirements

The Tuition Waiver Program is available to full-time, permanent faculty, EHRA, SHRA, and ROTC employees who:

- Are regularly scheduled to work 30 hours or more each week, 9 months of the year or longer,
- Meet normal work obligations and continue permanent employment status for the entire semester during which the course is taken, and
- Have been admitted to a UNC-system institution and registered for course(s).

Course Eligibility Requirements

Any course, graduate certificate program, distance education, and extension program within the UNC system that earns academic credit is eligible for a tuition waiver.

However, continuing education workshops and seminars that provide continuing education units (CEU) are not eligible for a tuition waiver.

Note: UNC Charlotte employees receive an employee discount for programs offered through Continuing Education. For additional information, contact the Office of Continuing Education, Extended Academic Programs.

Approval Policy

Waivers must be reviewed by the employee’s manager in Banner Self Service each term. If the employee’s manager is on extended leave, the request will be sent to the manager of the employee’s manager.

Fees

The Tuition Waiver Program waives tuition, admissions fees, and the fees indicated in the table below. This means no money changes hands. As a result, if staff/faculty members who use tuition waivers want to use any of the student facilities or services, such as the gyms and fitness centers on campus, or the light rail, they must pay for them out of pocket.

Type	Fee	Waived?
Admissions Fee	- If you apply for admission to a UNC system school other than UNC Charlotte, contact that school's Admissions Office to inquire about having the admissions fee waived. - While completing your application for admission to UNC Charlotte, you will encounter an admission fee. BEFORE you click the final Submit/OK button, follow the steps below to request that your admission fee be waived. - If applying for undergraduate admission at UNC Charlotte, then contact admissions@charlotte.edu to have your admission fee waived. - If applying for graduate admission at UNC Charlotte, then contact gradapponline@charlotte.edu to have your admission fee waived.	Yes
Required Fee	Ed & Tech Fee	Yes
Required Fee	University Fees	Yes
Required Fee	General Fees- includes Athletics, Health Services, Student Activities, Debt Service	Yes
Required Fee	49er Card System Student Association Fee	Yes
Required Fee	Food Service Facilities Misc. Service Charge	Yes
Required Fee	Safety and Security Fee	Yes

Fees Continued

Type	Fee	Waived?
Required Fee	*Transportation Misc. Service Charge- includes Niner Transit campus shuttle system, Niner Paratransit service, and the CATS Access Pass	Yes
Special Fee	Certificate/Master's GRAD7999- Resident	Yes
Special Fee	Doctoral GRAD9999- Resident	Yes
Special Fee	Certificate/Master's GRAD7999- Non-Resident	Yes
Special Fee	Doctoral GRAD9999- Non- Resident	Yes
Special Fee	Experiential Learning Fee/Co-op	Yes
Special Fee	Matriculation fee- New Students only	No
Special Fee	International Student Fee (Students with visa type F or J) - per term	No
Special Fee	College of Arts and Architecture General Student Fee- per term	No
Special Fee	College of Engineering Student Fee- per term	No
Special Fee	College of Computing and Informatics Student Fee- per term	No
Special Fee	College of Health and Human Services Student Fee- per term	No
Special Fee	Advanced Scuba Diving Fee (PHED 2220)	No
Special Fee	Scuba Diving Fee (PHED 2219) Non-Major	No
Special Fee	First Aid: Responding to Emergencies (ATRN/EXER 2290)	No

***NOTE** regarding the Transportation Misc. Service Charge- The staff pass is \$75 for a year, whereas the student pass is \$25 per semester (including summer). If you are enrolled in classes through the Tuition Waiver Program, you will still need to purchase a CATS all-access transit pass because this fee was waived.

UNC Charlotte Faculty/Staff Textbook Loan Policy

UNC Charlotte employees applying for a tuition waiver may also take advantage of the Faculty/Staff Textbook Loan (FSTL) program, which waives \$200 from the full purchase price of required textbooks per course. The employee is responsible for paying any amount over the \$200 per-course waiver. This amount must be paid by cash, check, 49er card, or credit card when the textbook(s) are collected.

Example:	
\$350	Full Purchase Price
-\$200	FSTL Waiver
\$150	Out-of-pocket expense for Employee

However, all textbooks remain the property of the FSTL program, and borrowed textbook(s) must be returned in satisfactory condition to the UNC Charlotte Barnes & Noble campus store:

- three business days following the end of final exams,
- upon the withdrawal from the course, **or**
- following separation from employment- whichever comes first.

Failure to do so will result in the “full purchase price” of the textbook(s) being deducted in a lump sum from the employee’s next pay stub.

Taxation for Undergraduate Students

Qualified tuition reduction is the amount of any reduction in tuition provided to an employee of an organization for education below the graduate level at a university. Gross income shall not include any qualified tuition reduction in accordance with IRC § 117. Specifically, IRC § 117 (d)(2) states that any qualified tuition reduction provided to an employee of an educational institution for undergraduate courses is excludable from gross.

If qualified tuition reductions are granted to an employee, and the undergraduate courses are either job-related or not job-related, then they are not taxed.

Taxation for Graduate Students

Under IRC § 127(a), graduate-level tuition waivers provided by a university to its employees are excludable from taxation in the amount up to \$5,250 per calendar year if the tuition waivers are provided as part of an educational assistance program described in IRC § 127 (b).

Tuition waiver or reduction provided over \$5,250 is considered a taxable fringe benefit for income tax purposes, unless the education is necessary for the employee to maintain or acquire skills necessary for current employment or the education meets an explicit requirement by the employer, law, or regulations and, therefore, would qualify as a deductible business expense under IRC § 162 had the employee paid the tuition himself.

Under IRC § 117 (d)(5), in the case of graduate students who are engaged in teaching or research activities at the educational institution, tuition reduction for graduate-level education is considered qualified tuition reduction. This section applies only to teaching and research assistants who are graduate students and not faculty or staff engaged in research or teaching.

If Applied Tuition Waivers...	And...	Then...
Value up to \$5,250 per calendar year	The course(s) are either job related or not job related	Not taxed
Exceed \$5,250 in value per calendar year	The education is necessary for the employee to maintain or acquire skills for current employment or meets an explicit requirement by the employer, law, or regulations and, therefore, would qualify as a deductible business expense had the employee paid the tuition him/herself, or involves a graduate student (not faculty or staff) who is engaged in teaching or research activities at the educational institution	Not taxed
Exceed \$5,250 in value per calendar year	The education would not qualify as a deductible business expense under IRC § 162 had the employee paid the tuition him/herself	Taxed

Change in Employment Status

The employee must continue his or her permanent employment status and complete the full schedule of normal work obligations for the entire semester during which the course is taken. Termination or other changes in employment status that would make the employee ineligible under this policy or the Board of Governors' Policy or Regulations will result in the employee being billed for the tuition and fees for the entire semester unless he or she has officially withdrawn from the class within the allowable time frame designated by the University.



If the separated employee does not pay the amount due, they are sent to collections.

Tuition Waiver Allotment Policy

The statutes, policies, and administrative regulations governing tuition waiver permit each institution within the UNC system to implement the waiver of tuition and fees at its discretion. Therefore, it is important to contact the Registrar's Office or Student Accounts/Bursar's Office of the institution you're attending to learn more about their tuition waiver policies.

UNC Charlotte employees are entitled to apply for a tuition waiver for up to three courses during the academic year, defined as fall, spring, and summer terms. As pictured in the table below, no more than two waivers may be used during either the fall or spring semester, and only one waiver may be used between spring commencement and the first day of classes for the following fall semester.

Options	Fall	Spring	Summer
A	2 Waivers	1 Waiver	0
B	1 Waiver	2 Waivers	0
C	1 Waiver	1 Waiver	1 Waiver
D	2 Waivers	0	1 Waiver
E	0	2 Waivers	1 Waiver

Note: Employees who wish to take more than three courses during the academic year may wish to explore the Tuition Reimbursement program.

UNC System Policy changes in 2021 extend to certain sworn University law enforcement officers the opportunity to enroll in unlimited courses free of tuition and fees.

Policy on Courses with Required Labs

If the course requires a lab that must be taken during the same semester, one tuition waiver will be applied. However, if the course and lab may, and are taken separately (during different semesters), then two tuition waivers will be applied.

Cancellation Policy

This policy describes how an approved tuition waiver is applied (i.e., counted against the allotment of three per academic year) when a course is dropped or a waiver is cancelled.

- The course should be dropped within the designated add/drop (A/D) period for that particular semester and institution. Since all UNC system institutions have different D/A/ dates and deadlines, it is important to consult the academic calendar for the institution in which you are enrolled.
- If you **drop** a UNC Charlotte course before the A/D deadline, the tuition waiver will also be automatically cancelled in Banner Self Service.
- If you **withdraw** from a course after the A/D deadline, your tuition waiver has been spent and cannot be reapplied.

Misapplied Tuition Waiver Policy

Any employee who intentionally misapplies or falsely reports their allotment of tuition waivers will be considered to have violated University Policy 804, Standards of Ethical Conduct and may be subject to review and potential discipline.

Introduction

The Tuition Waiver Program provides an opportunity for eligible employees to have tuition waived for a course taken at UNC Charlotte or any other institution within the University of North Carolina system. Participation is voluntary, and employees may take courses for professional or career development. This section of the guide is designed to guide employees through the procedures of applying for tuition waivers.

Tuition Waiver Procedures for Admission to UNC Charlotte

HOW TO HAVE YOUR ADMISSION FEE WAIVED AT UNC CHARLOTTE

For further information on having admission fees for UNC Charlotte waived, visit the [What fees are covered by the tuition waiver program? Knowledge Article](#).

HOW TO APPLY FOR UNC CHARLOTTE TUITION WAIVER AND TEXTBOOK LOAN

For further information on applying for a UNC Charlotte tuition waiver and textbook loan, visit the [How do I apply for tuition waiver for courses at UNC Charlotte? Knowledge Article](#).

Tuition Waiver Procedures for other UNC System Institutions

HOW TO HAVE YOUR ADMISSION FEE WAIVED AT OTHER UNC INSTITUTIONS

For further information on having admission fees waived at other UNC Institutions, visit the [What fees are covered by the tuition waiver program? Knowledge Article](#).

HOW TO APPLY FOR TUITION WAIVER AT OTHER UNC INSTITUTIONS

For further information on applying for tuition waivers at other UNC Institutions, visit the [How do I use tuition waiver at other UNC System institutions? Knowledge Article](#).

HOW TO SUBMIT AN APPROVED TUITION WAIVER TO ANOTHER UNC INSTITUTION

For further information on submitting an approved tuition waiver, visit the [How do I submit an approved tuition waiver for payment other UNC System Institutions? Knowledge Article](#).

General Tuition Waiver Procedures

HOW TO CHECK THE STATUS OF A REQUEST FOR TUITION WAIVER

For further information on checking the status of a request for tuition waivers, visit the [How do I check the status of a request for tuition waiver?](#) Knowledge Article.

HOW TO CANCEL AN APPROVED TUITION WAIVER

For further information on cancelling an approved tuition waiver, visit the [Cancel a Tuition Waiver Request FAQ](#).

Introduction

This section of the guide is designed to guide managers through their policies and procedures for reviewing an employee's online request for a tuition waiver.

Critical University Policies

Employees and their managers who use the tuition waiver benefit should carefully and thoroughly read and abide by University Policy 101.1, Tuition Privileges for Certain Faculty and Staff, including all of the "Related Resources" at the bottom of the page.

You must find and follow the academic calendar, tuition waiver policies, and procedures established by the enrolling institution. Contact the Student Accounts/Bursar's Office, the Registrar's Office, or the degree program director of the enrolling institution to learn more about the academic calendar, tuition waiver policies, and where to send your approved waiver for processing.

The Manager's Role and Responsibilities

Managers are responsible for encouraging and supporting the professional development of their direct reports. In doing so, they are responsible for following University Policy 101.1 (tuition privileges for certain faculty and staff) and University Policy 501 (non-discrimination). The annual performance appraisal goal-setting process is an ideal time to discuss professional development, such as a tuition waiver.

Employees are encouraged to tell you about the specific course(s) they plan to take, and, if the class meeting schedule conflicts with their regular work schedule, to work with you to create an alternate work schedule, if possible.

Tuition Waiver Manager Procedures

HOW TO RESPOND TO A REQUEST FOR TUITION WAIVER

For further information on how to respond to a request for tuition waiver, visit the [How do I respond to an employee's request for tuition waiver?](#) Knowledge Article.

IF THE REQUEST IS SENT TO THE WRONG MANAGER

For further information on what to do if a request is sent to the wrong manager, visit the [What if the employee's request for tuition waiver is sent to the wrong manager?](#) Knowledge Article.

IF THE MANAGER IS ON LEAVE

For further information on a Manager's roles and responsibilities, including what to do if a Manager is on leave, visit the [What is the manager's role and responsibilities in the tuition waiver process?](#) Knowledge Article.