

## TUITION GRANT PLAN FREQUENTLY ASKED QUESTIONS

### INTRODUCTION

#### 1. What is the Tuition Grant Plan?

The Tuition Grant Plan assists benefits-eligible employees and retirees by helping them pay for a portion of their dependent children's **full-time, undergraduate** college education.

#### 2. Where can I find all the necessary forms and information?

Go to the [Benefits website](#).

### ELIGIBILITY

#### 3. Who is eligible for this benefit?

Dependent children of full-time faculty, staff or bargaining unit members of the School of Advanced International Studies (SAIS), Krieger School of Arts and Sciences, Carey Business School, School of Education, Whiting School of Engineering, School of Medicine, School of Nursing, Peabody Institute, Bloomberg School of Public Health, Libraries, University Administration, Academic Centers and Homewood Student Affairs with two years of consecutive full-time employment and continuing in a full-time position are eligible to participate in this plan through the end of the calendar year in which they turn 26. For this purpose, "dependent children" are: biological children, adopted children, children placed with the eligible employee for adoption, stepchildren, children of the employee's domestic partner, or children for whom the eligible employee has been appointed legal guardian. Eligible dependents are limited to the following: A child who is the employee's "dependent" within the meaning of Internal Revenue Code section 152 and is either a "qualifying child" or a "qualifying relative".

The two-year eligibility cutoff dates are October 1<sup>st</sup> for the Fall semester and February 1<sup>st</sup> for the Spring semester. This means that if you are employed with the university and you celebrate your two-year anniversary prior to the cutoff date-October 1<sup>st</sup> or February 1<sup>st</sup> you are eligible for the semester after the completion of two-years.

In circumstances where disability prevents an otherwise eligible dependent from enrolling as a full-time undergraduate (i.e., the 12-credit hour requirement), the university shall consider waiving the credit hour and/or age requirement. If an exception is granted, tuition grant eligibility is still limited to eight semesters of undergraduate study. All such requests shall be considered by the university's Office of Institutional Equity (OIE) in accordance with the university's commitment to ensuring equal opportunity for individuals with disabilities. Additional information supporting the disability will be required by OIE. Please complete and submit the [OIE form](#) to request an exception to Tuition Grant eligibility on the basis of a dependent's disability. The benefit is available only during periods in which the faculty or staff member is employed full-time, or during periods of authorized leave not exceeding one year in duration from which the faculty or staff member will return to full-time employment.

**4. What documentation is required for my child's eligibility?**

Employees must submit the child's birth certificate (English Translation). For children not born in the U.S., Canada or Mexico, one of the following documents must be submitted in addition to a birth certificate:

- 1) Green Card
- 2) U. S. Visa
- 3) U.S. Passport
- 4) Certificate of Naturalization

**5. Are retirees' dependent children eligible to participate in the benefit?**

Yes. Please contact the Benefits Service Center for more information on how to apply.

**6. Are domestic partners' dependent children eligible for this benefit?**

Yes, if the employee has filed an [Affidavit of Marriage/ Domestic Partnership](#) with the Benefits Service Center.

**7. Can the two-year employment requirement be waived?**

The two-year employment requirement will be waived for full-time employees who come directly to Johns Hopkins University within 30 days from an employer where they were previously eligible for a similar dependent education benefit and can provide proof of eligibility from the prior employer. **Waivers submitted for new faculty will be reviewed on a semester basis.** Please see sample [Waiver Letter](#) for required language.

**8. Do dependent children have to be claimed on the employee's tax return?**

Children participating in the Tuition Grant Plan must either be claimed on employees' tax return or the employee must complete a [Dependent Expense Form](#) **annually** to verify financial support of greater than 50% to be eligible to participate in the Tuition Grant Plan.

**9. What is the maximum number of years a child may participate?**

The plan covers costs for up to four years (8 semesters or the equivalent trimester/quarter terms) of undergraduate study. Part-time mini-sessions (e.g., summer mini-sessions) do not count against the child's maximum participation.

**10. What colleges and universities are covered?**

The school must be an accredited, degree-granting college or university.

**11. How do I find out if a college/university is an accredited, degree-granting institution?**

Accreditation and degree-granting status can be confirmed with the college or university's Admissions Office.

## 12. Is there a grade requirement?

No.

### **COVERAGE: (costs, credits, participation, colleges)**

## 13. What costs are covered?

Fifty percent of tuition and eligible fees, up to one-half of Johns Hopkins University's freshman undergraduate tuition, are covered for each eligible employee.

The university's policy is to cover fees that are charged by the majority of institutions currently participating in the plan.

- |                              |                                   |
|------------------------------|-----------------------------------|
| 1. Activity                  | 6. Registration                   |
| 2. Athletic/Recreation       | 7. Student Government Association |
| 3. Facility                  | 8. Technology                     |
| 4. Health Center             | 9. Transportation                 |
| 5. Orientation/Matriculation | 10. General (includes Graduation) |

These 10 fees are considered eligible for payment when they meet all of the following criteria:

- The fee is charged to all students no matter what type of degree they are pursuing
- The fee does not fund debt or financial aid for other students
- The fee is not optional and cannot be refunded to the student
- The fee is not related to a specific course or degree
- The purpose of the fee can be defined by the institution

### **A partial list of excluded fees/expenses may include:**

Accommodations

Airfare

Books

Course related fees

Equipment (e.g., laptops, sports equipment, etc.)

Excursions

Health insurance or other insurance

Late fees

Room and board

## 14. Are study abroad programs covered?

Study abroad programs are covered for degree-required courses. Please complete and submit the [Study Abroad Certification Letter](#) and a new tuition grant application if your child plans to attend a study abroad program where the payment will **not** be sent to your child's home school. To determine the payment process, you may need to contact your child's school for clarification. Please refer to the [Study Abroad Certification Letter](#) which includes more information on the Study Abroad process.

### **15. Are mini-sessions and summer courses covered?**

Payments are available for mini-sessions and summer courses if:

- The continuing student meets the definition of a full-time student (see question 16.) within the current academic, and
- The student, new to the plan, meets the definition of a full-time student (see question 16.) in the upcoming academic year - eligible for courses taken in Summer/Fall/Spring/Summer during his/her first year, and
- The student has not received the maximum grant allowance for the academic year, and
- The employee is in a full-time position when the student begins the mini-session or summer course.

If attendance in the upcoming academic year does not occur, it will be the employee's obligation to promptly repay any monies disbursed erroneously, after notification by the university. Please contact the [Benefits Service Center](#) if your child plans to attend a mini-session or summer course at their current or "home" school. If your child is taking a mini-session or summer course at a new school (not previously attended), an additional application will need to be completed.

Children who receive full financial support from other sources for the entire academic year must provide documentation to confirm that they attended full-time for the entire academic year to be eligible for mini-sessions and summer courses.

### **16. How many credits are considered full-time study?**

Twelve or more degree-required credits per semester are considered full-time studies for colleges with two full-time semesters. Twenty-four or more degree-required credits per academic year are considered full-time studies for colleges with full-time trimesters or full-time quarters. However, in circumstances where disability prevents an otherwise eligible dependent from enrolling as a full-time undergraduate (i.e., the 12-credit hour requirement), the university shall consider waiving the credit hour and/or age requirement. If an exception is granted, tuition grant eligibility is still limited to eight semesters of undergraduate study. All such requests shall be considered by the university's Office of Institutional Equity (OIE) in accordance with the university's commitment to ensuring equal opportunity for individuals with disabilities. Please complete and submit the [OIE form](#) to request an exception to Tuition Grant eligibility on the basis of a dependent's disability.

### **17. If a child's registration drops to fewer than 12 credits, what happens?**

The child is no longer eligible to participate in the plan (unless he/she is in their final semester prior to graduating and needs fewer than 12 credits), and the grant payment (if made) must be refunded to Johns Hopkins University.

**18. What if a child withdraws before the end of the term?**

Payments issued for students who withdraw involuntarily (e.g., illness) before the end of the term will be refunded based on their college's refund policy. If the payment is not refunded in full, the term will be considered used and counted towards the eligible terms within the four-year period. If the employee prefers not to have the semester count as a used term, they have the option to send in the difference between the refund received from the college and the amount of the Johns Hopkins University Tuition Grant payment by June 30<sup>th</sup> of the current academic year. Payments issued for students who voluntarily withdraw before the end of the term must be refunded in full.

**19. What if my Johns Hopkins University employment ends during my child's participation?**

Employees who leave the university after October 1 are eligible to participate in the plan for the fall semester; employees who leave the university after February 1 are eligible to participate in the plan for the winter/spring semesters.

**20. What effect will a change in status from full-time to part-time have on Tuition Grant participation?**

As long as you have met the two-year eligibility criteria as a full-time employee and your change in status to part-time is **less than six months**, before returning to full-time service, you will remain eligible for the benefit. However, if your change in status to part-time is **six months or greater** before returning to full-time service, you will have to meet the two-year eligibility criteria as a full-time employee to regain eligibility for the benefit.

**21. What happens if the employee or retiree dies?**

If an employee following 5 years of continuous benefit eligible employment or retiree dies, any dependent including step children and dependents of domestic partners of the employee or retiree at the time of death will remain eligible for the program until they reach the plan semester limit or age out of the plan. The child must be born prior to the employee's death to be eligible.

When each child is ready to attend college, the surviving spouse or caretaker should contact the [Benefits Service Center](#) with the employee's name and employee number (if known) and the dependent who will be attending school to let us know they are ready to use the benefit. A paper application will be sent for completion. Please contact the Benefit Service Center before July 1 of the preceding fall semester or before January 1 if the spring semester will be their first semester of college.

**22. Are full-time specialty programs (e.g., nursing) that require students to take less than 12 degree-required credits eligible?**

Yes. Programs with credit restrictions are approved for coverage; however, additional documentation is required. Please see sample [Specialty Program Letter](#) for required language.

**23. Can a student participate in BOTH the Tuition Grant Plan and the Tuition Remission Plan?**

Yes. An eligible student may participate in BOTH the Tuition Grant benefit and the Tuition Remission benefit, subject to the provisions of each benefit. The availability of the Tuition

Remission Plan does not guarantee that remission will be accepted by the academic division. Employees should check with the Admissions Office before applying for tuition remission.

## **APPLICATION PROCESS**

### **24. How does an employee begin participation in the Tuition Grant Plan?**

Employees must complete the [Tuition Grant Plan Application](#). Eligibility to participate in the plan is contingent upon providing documentation validating the dependent child's status (see FAQ Question # 4).

### **25. How does an employee in the plan make changes to their current participation (e.g., your child has transferred to a different college or a child is added to the plan)?**

If your child is graduating, please contact the [Benefits Service Center](#). If a child takes a semester off and returns to their current or "home" school (currently on file), a new Tuition Grant Plan Application is not required but you will need to notify the [Benefits Service Center](#). If a child transfers to a different college or there are any other changes to the information currently on file, you will need to update your child's [Tuition Grant Plan Application](#) with the changes.

### **26. If an employee currently participating in the plan has no changes, what action must be taken?**

At the beginning of each academic year, participating employees will receive an e-mail asking them to review their child's Tuition Grant Plan Application for any updates and to confirm participation in the Plan for the upcoming academic year.

### **27. When should I apply?**

After your child has been accepted into college, you may submit your [application](#) as early as January 1 for the upcoming academic year.

### **29. Is there a deadline for submitting an application?**

Applications must be submitted online by June 30<sup>th</sup> of the current academic year in which the employee will participate. Applications cannot be accepted for prior years.

### **30. What information is contained in the Grant Award Notice (GAN)?**

The Tuition Grant Award Notice describes the Tuition Grant Plan, specifies the percent of coverage for the participating student, and contains a bottom section for colleges'/universities' representatives to complete with: tuition and fee information, office address, telephone and fax numbers, and contact person name, and signature and e-mail address.

### **31. When are colleges and universities notified of a child's participation in the plan?**

For continuing participants, the Grant Award Notices will begin to be sent to schools in June for the Fall semester, and in November for the Spring semester. For new applicants, the notices will generally be sent within a week after receiving the employee's completed application unless the application is for the upcoming Fall semester. For students beginning participation in the upcoming Fall semester, our office will begin submitting notices to the schools upon notification of the cost of undergraduate tuition for Johns Hopkins University.

## FINANCIAL AID/OTHER SCHOLARSHIP SUPPORT

### **32. If a child receives restricted financial support from other sources, are they still eligible to receive support from Johns Hopkins University?**

Yes. If other "restricted" aid (support that must be spent on tuition and fees) is received in addition to the university's tuition grant, the total combined support may not exceed 100% of the tuition and eligible fees. If the total exceeds 100%, the tuition grant will be reduced (see examples 1 & 2 below. Non-restricted aid (support that may be spent on all educational expenses, e.g., housing, books, etc.) will not affect your child's tuition grant.

Example # 1: One employee is eligible for JHU Tuition Grant Plan (50% level) and child receives "restricted" financial support in addition to the JHU grant that is greater than 50%		Example # 2: Two employees are eligible for the JHU Tuition Grant Plan (100% level) and their child receives <b>any</b> "restricted" financial support in addition to the JHU grant	
Tuition & eligible fees per semester =	\$20,000.00	Tuition & eligible fees per semester =	\$20,000.00
Minus the other "restricted" financial support received in addition to JHU grant that is greater than 50%	\$15,000.00	Minus the other "restricted" financial support received in addition to JHU grant	\$1,000.00
JHU Tuition Grant payment =	\$5,000.00	JHU Tuition Grant payment =	\$19,000.00

In some cases, the child's school will notify JHU if there is additional support from other sources, but it is the employee's responsibility to make sure that JHU is aware of restricted support that may affect the child's tuition grant. The employee will be responsible for any overpayments that may result if JHU is not notified.

## PAYMENT PROCESS

### **33. When can the college expect to receive payment?**

Upon our receipt of the completed Tuition Grant Award Notice indicating itemized tuition and fee information from the school, a payment can be processed. Payments for Fall will begin as early as July and payments for Spring will begin as early as January.

### **34. I have an invoice from my child's school. Can a payment be made based on that?**

It is preferred that the payment documentation comes directly from the school. However, Tuition Grant payments may be made from a parent's invoice, copy of on-line account, statement of account, e-mail or letter from school representative. The payment documentation submitted **must** contain the student's name, itemized list of charges and the semester or term.

### **35. Does Johns Hopkins University guarantee parents it will meet the colleges/universities payment due dates?**

Payment is not guaranteed to be made prior to the school's deadline for payment. Please note, as a third-party sponsor, Johns Hopkins University, may not have the same payment deadline as students/parents. Some schools wait until after registration is finalized (add/drop period is completed) before returning the completed Tuition Grant Award Notice for payment to ensure all charges are final. We make every attempt to make payments on time; however, the parent/student is ultimately responsible for ensuring their portion of the payment is received by the due date.

**36. What should I do if I do not see a credit for Johns Hopkins University's payment on my child's account and the college's payment due date has past?**

Contact your child's school to confirm that the college has received the Grant Award Notice. If the school has not received the notice, contact the [Benefits Service Center](#).

**TAXABILITY**

**37. Is the benefit taxable?**

The benefit is not taxable for children who meet the IRS definition of dependent. However, the benefit is considered taxable income for employees participating with the dependent child of their domestic partner. In situations where an OIE-approved disabled dependent participates beyond the end of the calendar year in which they turn 26, the benefit is considered taxable income for the employee.

**LIMITATIONS/DISALLOWANCES**

**38. What does the plan not cover?**

- Part-time studies (11 credits and below)
- Non-credit courses (e.g., remedial)
- Graduate courses or programs
- Cooperative programs that do not offer academic credits
- Pass/fail courses for which no academic credits are earned
- Courses offered by non-degree granting or non-accredited institutions
- Course related fees
- Program fees

**CONTACT INFORMATION**

**39. Contact information for the Benefits Service Center:**

- Email: [benefits@jhu.edu](mailto:benefits@jhu.edu)
- Phone: 410-516-2000
- Fax: 443-997-5820
- Location: 1101 East 33<sup>rd</sup> Street, Suite D200, Baltimore, MD 21218