Policy 4.96
Courtesy Scholarship

Responsible Official: VP for Human Resources
Administering Division/Department: Benefits
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Policy Sections:
I. Overview
II. Applicability
III. Policy Details
IV. Definitions
V. Related Links
VI. Contact Information
VII. Revision History

Overview

Emory offers a Courtesy Scholarship Program for the continued educational development of employees, their spouses, and eligible children.

Applicability

n/a

Policy Details

The Courtesy Scholarship covers only academic credit hours for which an employee, spouse or child (natural or legally adopted) actually enrolls in an academic session, up to the maximum credit hours allowed. Courtesy Scholarship benefits not utilized in an academic session will not be monetarily reimbursed to the scholarship recipient nor credited to an account for future use.
Courtesy Scholarships for employees, spouses and children are subject to reduction by the amount of any other scholarship and/or financial aid, including the Georgia Tuition Equalization Grant and HOPE Scholarship.

Eligible employees are responsible for all expenses not covered by the Courtesy Scholarship Program.

The taxability of educational assistance is determined by federal regulations and is subject to change. Employees should consult with a tax advisor with regard to the impact of Courtesy Scholarship on personal income taxes.

Employees will not be eligible to participate in the Tuition Reimbursement Program in any school or session in which they are enrolled in a course at Emory under the Courtesy Scholarship Program.

The Courtesy Scholarship benefit available will depend on:

- the employee’s date of hire
- the employee’s eligible length of service
- the employee’s employment status
- for family members, their relationship to the employee

Courses taken on an audit basis are not covered under the Courtesy Scholarship Program.

Any work time missed due to taking courses under this program must be made up on an hour-for-hour basis under the authorization and scheduling needs of the department.

ELIGIBILITY

Employees

Regular full-time employees (36 standard hours or 0.9 FTE) who have completed 1 year of continuous eligible service receive Courtesy Scholarship for up to 5 credit hours per semester. Classes may be at the undergraduate, graduate or professional level.

Regular part-time employees working at least 20 hours per week and who have completed 2 years of continuous eligible service, may receive Courtesy Scholarship for up to 4 credit hours per semester. Classes may be at the undergraduate, graduate or professional level.

School of Medicine faculty at the rank of Assistant Professor or above with an appointment at the VA Medical Center may be eligible for courtesy scholarships if they meet the service requirements, even if the VA is the sole source of salary and they receive no salary from Emory University.

Employees, who would meet the eligibility for Courtesy Scholarship for themselves or dependents within a 31-day period after the start of the class are considered to have met eligibility.

Eligibility determination for Courtesy Scholarship benefits shall be made on the basis of employment status of the employee on the beginning date of classes for the particular academic session. Medical House Staff are not eligible for Courtesy Scholarship.

Spouse/Children

The spouse and or children of an eligible employee may receive courtesy scholarship when enrolled in an undergraduate degree-seeking program. The graduated benefit chart below details the benefit levels. Documentation of the relationship is required.
<table>
<thead>
<tr>
<th>Full Time</th>
<th>Part Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 up to 5 years</td>
<td>50% of Emory tuition</td>
</tr>
<tr>
<td>5 up to 10 years</td>
<td>75% of Emory tuition</td>
</tr>
<tr>
<td>10 years and up</td>
<td>100% of Emory tuition</td>
</tr>
</tbody>
</table>

**Spouse**

A marriage certificate is required for spouse benefit.

The spouse of an eligible regular full-time employee or retiree may receive courtesy scholarship for up to 5 credit hours per academic session when enrolled in an undergraduate degree seeking program following the completion of 2 consecutive years of service by the employee.

The spouse of an eligible regular part-time employee or retiree, working at least 20 hours per week, may receive courtesy scholarship for up to 4 credit hours per academic session when enrolled in an undergraduate degree seeking program following the completion of 4 consecutive years of service by the employee.

**Children**

Children are defined as the eligible employee’s or retiree’s natural or legally adopted children in a degree-seeking status and under age 25 enrolled in an undergraduate degree-seeking status.

Proof of relationship is required for dependent recipients. Proof includes birth certificates and legal adoption documents. A legal guardianship does not qualify for this benefit.

There is no limitation on the number of academic credit hours covered by Courtesy Scholarship in an academic session. Summer classes including Emory Abroad are covered. Children enrolled in the Emory Pre-College Summer Program for academic credit are eligible for the Courtesy Scholarship. Non-credit hour programs are not eligible for the Courtesy Scholarship.

This benefit is provided per dependent. If both parents are Emory employees and eligible for the Courtesy Scholarship for their children, the graduated benefit will be based on the parent with the higher years of service. The benefit will not be additive. For example, if both parents are eligible for a 50% benefit, the total benefit will be 50% of tuition (not 100%).

**Retired Employees**

Employees who are eligible to retire with benefits from the University are eligible for the Courtesy Scholarship as follows:

- Retired employees who retired from a full-time position may enroll in an undergraduate or graduate program not to exceed a total of 5 credit hours per academic session.
- Retired employees who retired from a position working at least 20 hours per week may enroll in an undergraduate or graduate program not to exceed a total of 4 credit hours per academic session.
- Dependents of an eligible retiree are eligible as described above.

**Spouses and Children of Deceased Employees**

Spouses and children of deceased employees, who at the time of death were current employees and had met eligibility for courtesy scholarship benefits for spouse and children shall be eligible to enroll in an undergraduate degree-seeking program each academic session, not to exceed the limits defined above for spouse and children.

The graduated benefit schedule will apply based on the deceased employee’s service at the time of death, except that:
• For full time eligible employees: if the employee had at least one year of service, but less than two years of service at the date of death, the graduated benefit will be 50% of Emory tuition. If the employee had a least four years of service, but less than five years of service at the date of death, the graduated benefit will be 75% of Emory Tuition, and if the employee had at least nine years of service, the graduated benefit will be 100% of Emory tuition.

• For part time eligible employees: if the employee had at least three years or service, but less than four years of service at the date of death, the graduated benefit will be 50% of Emory tuition. If the employee had at least six years of service, but less than seven years of service at the time of death, the graduated benefit will be 75% of Emory tuition, and if the employee had at least eleven years of service, the graduated benefit will be 100% of Emory tuition.

• For employees hired before January 1, 2003, and who died prior to completing 10 years of service with Emory: the benefit will be 100%

NOTE: Surviving spouses who remarry will not be eligible for the Courtesy Scholarship benefit.

LOSS OF ELIGIBILITY

Leave of Absence

Refer to the applicable Leave Policy for the impact on Courtesy Scholarship benefits.

Break in Service

Separation from employment or changing to an ineligible status for less than 12 consecutive months shall not be considered a break in service for determining employment credit, provided the employee returns in a status eligible for the Courtesy Scholarship, however the time in an ineligible status will not be included in length of service calculation.

Separation from employment or changing to an ineligible status for more than 12 months shall be considered a break in service, and the applicable waiting period must again be satisfied upon re-hire based on the rehire date.

Periods of employment in either a status of temporary or regular part-time for less than 20 hours a week shall not be counted for length of employment determinations.

Prior Employment Credit

Previous periods of employment, except for those periods in which a break-in service of greater than 12 months occurs, shall be handled as follows:

For employees in a current regular full-time status, previous periods of eligible regular part-time employment shall be divided by 2 and added to the current and any other periods of eligible regular full-time employment to determine the eligible regular full-time length of employment equivalency.

#full-time months + (# equivalent part-time months /2) = # equivalent full-time months

For employees in a current regular status of at least half time but less than full time, previous periods of eligible regular full-time employment shall be added to the current and regular part-time equivalency.

ADMISSIONS PROCEDURES

Information concerning admission to an academic program should be obtained from the appropriate University admissions office. Admission offices for the schools or divisions can be contacted at:

<table>
<thead>
<tr>
<th>School/Division</th>
<th>Phone Number</th>
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</thead>
<tbody>
<tr>
<td>Candler School of Theology</td>
<td>404-727-6326</td>
</tr>
<tr>
<td>Emory College of Arts &amp; Sciences</td>
<td>404-727-6036</td>
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