



MICHIGAN TECHNOLOGICAL UNIVERSITY

OFFICE OF THE PRESIDENT

November 5, 2019

Dr. Mike Mullins
President
University Senate
Michigan Technological University
1400 Townsend Dr.
Houghton, MI 49931

Dear Mike:

Please find attached the University's revised policy regarding TRIP pursuant to the University Senate's proposal to change the tuition reduction incentive plan benefit for dependents, spouses, and designated eligible individuals.

I appreciate your leadership, along with that of University Senate, to work collaboratively throughout this process.

Sincerely,

A handwritten signature in black ink, appearing to read 'Richard J. Koubek'.

Richard J. Koubek
President

Cc: Sue Kerry, Senior Vice President and Chief Financial Officer



**Michigan
Technological
University**

**TUITION REDUCTION INCENTIVE PROGRAM (TRIP)
for SPOUSES or DESIGNATED ELIGIBLE INDIVIDUALS (DEI) and DEPENDENTS
(updated January 1, 2020)**

GUIDELINES

Spouses or Designated Eligible Individuals (DEI) and dependents of eligible employees who meet the program requirements are eligible for a reduction in tuition for University degree programs at Michigan Technological University. The TRIP program will provide the following discounts based on years of service (applies to benefit-eligible employees):

- 0-1 years of service: not eligible
- 2-3 years of service: 50% discount
- 4+ years of service: 75% discount

Note:

The TRIP benefit becomes available to benefit-eligible employees the semester following the date they surpass their years of services eligibility requirement.

LIMITATIONS

The TRIP benefit applies to undergraduate and graduate classes with the following maximums:

- 8 semesters of undergraduate classes
- 4 semesters of graduate classes

Note: If a student participates in the Cooperative Education Program, a total of 1 semester will not count toward the maximums.

New hires will be eligible for TRIP after 1 year of eligible service.

The TRIP benefit does not include books, supplies, fees, equipment, penalties or room and board.

Employees with less than 1 year of service with eligible TRIP participants taking classes prior to January 1, 2020 will still be eligible for a 50% discount through the duration of the degree program the participant is enrolled in.

Employees with eligible TRIP participants taking classes prior to January 1, 2020 who have exceeded the policy maximum will be eligible for the appropriate discount through the duration of the degree program the participant is enrolled in.

ELIGIBILITY

Eligible for the program are the spouse or DEI and/or unmarried children, who are dependents of the employee. Children are considered a dependent until the age of 26.

If an employee has opted out of Tech's health insurance because their spouse or DEI has medical coverage through another employer and can provide proof of dependency, the employee's dependent would be considered eligible.

If an eligible unmarried child has more than one eligible parent working at Tech, he or she is eligible for only one TRIP benefit. The student is eligible for no more than 50% or 75% tuition reduction through this program. The discount that will apply is the greater of the two parents discount.

Employees eligible for the Employee Education Program, cannot utilize the TRIP benefit.

Dual enrollment and non-dual enrolled (high school) students are eligible for the TRIP benefit. The TRIP benefit plus the high school contribution will not exceed actual tuition and related fees.

Study abroad charges will be eligible only if billed as Michigan Technological University tuition. Study abroad fees, housing fees, and other charges are not eligible for the TRIP benefit.

Children who are married are not eligible.

EXTENUATING ELIGIBILITY

Spouses or DEI and dependent children of eligible employees on approved leave of absence, not to exceed one year, will continue to be eligible for the TRIP benefit.

Eligible employees who are on active military duty will be eligible to participate in the TRIP benefit.

The spouse or DEI and dependent children will retain eligibility, until completion of their current degree program if their admission date is prior to (provided they have not exceeded the policy maximum):

- the death of the eligible employee.
- the layoff of the eligible employee.
- The retirement of the eligible employee (years of service + age = 80 OR 65 years old and 10 years of service OR MSPERS eligible)
- the child getting married.
- the eligible employee becomes qualified for long term disability.
- the child turning 26.

Additional extenuating circumstances may be reviewed on a case by case basis for the possibility of extending the provisions outlined in this policy.

Note:

Eligibility in current program will be retained until the student graduates or does not enroll in classes at Michigan Tech in a term (excluding summer), whichever comes first. If there is a gap in current program (excluding summer), dependents will no longer be eligible for the program.

ENROLLMENT AND ADMISSION REQUIREMENTS

Student applicants must be admitted or readmitted to Michigan Technological University in accordance with the normal requirements for admission and readmission. The student is responsible for all fees, books, room and board.

Students continue to be eligible as long as they meet the academic requirements for Michigan Tech attendance under the Dean of Student Affairs Scholastic Standards Policy.

REFUND

If the student drops courses or withdraws from the University during the refund period, any credit applicable to the TRIP benefit will revert back to the University.

TERMINATION OF THE TRIP BENEFIT

Except as stipulated, the TRIP benefit will be discontinued at the conclusion of the semester during which the employee or student becomes ineligible or employment is terminated, or ROTC member is reassigned.

TAXABILITY

This benefit may be taxable to the employee.

PROCEDURES

A TRIP application form can be obtained from and returned to the Benefits office. The form is to be signed by the eligible employee and retiree (as long as dependent was enrolled at the time of retirement) and student. One application form is to be completed for each student **each semester** the student is enrolled in the undergraduate, Master's Degree, or Ph.D. program.

Forms are due in the Benefits Office for each semester no later than:

- Fall Semester: July 1
- Spring Semester: December 1
- Summer Semester: April 1

If your application is turned in late, you may be responsible for paying your tuition bill with your own resources. After your application is processed, your account will be credited.

TRIP benefits will not be paid if the TRIP application is submitted later than six (6) months after the beginning of the semester.

After the eligibility of the employee has been verified by the Benefits Office, a copy of the application is sent to the Financial Aid Office for student eligibility approval.

The Financial Aid office will:

- Check to see if the student is registered and has **scheduled classes**.
- Enter a TRIP resource amount in the student's financial aid record.
- Retain applications with TRIP benefit dollar amount designated.

The Accounting Office will make the TRIP adjustments to the student's account.

01/01/2020