Lamar Institute of Technology
Faculty/Staff Course Enrollment Application Form

Application deadline:

First official class day of the semester/term. This Application is <u>not valid</u> until all administrative signatures have been obtained.

NOTE: A separate form MUST be completed and submitted for EACH course.

Section I: Employee Information

Employee Name (Last, First, Middle) _____ Contact Phone Number _____ Cell Phone Number _____ Banner ID No. _____

Job Title _____ Department Name _____ Email Address _____

Section II: Course Information

Course Name & Number _____ Course Description _____ Semester Credit Hours _____

Semester/Term & Year _____ Class Meeting Days and Time _____

Campus Location of Course:

____ Lamar University _____ Lamar Institute of Technology _____ Lamar State College Orange _____ Lamar State College Port Arthur _____

____ Other (specify college/university offering course) _____

This college/university is accredited by a regional accrediting agency approved by the U.S. Department of Education: ___ Yes ___ No

Degree/Credential Level: ____ Certificate ____ Associate ____ Bachelor's ____ Master's ____ Doctoral

Major/Program of Study: _____

Please explain how this course or degree plan is related to your current job duties or future role at LIT:_____

_____

Section III: Absence from Workstation Requested

Absence Requested: ___ Yes ___ No _____ Employee Signature _____ Date

Absence Approved: ___Yes ___ No _____ Direct Supervisor Signature _____ Date

___Yes ___ No _____ Next Level Supervisor Signature _____ Date

Step 1: Employee Signature _____ Date _____

Step 2: Direct Supervisor Signature _____ Date _____

Step 3: Next Level Supervisor Signature _____ Date _____

Step 4: Divisional VP Signature _____ Date _____

Step 5: Finance Office Signature _____ Date _____

Note: Employees receiving tuition assistance are subject to the 12-month service commitment and repayment provisions of Procedure LIT.5.04.02, Employee Education and Training Plan.

<u>FOR HUMAN RESOURCES & STUDENT FINANCIAL AID/ACCOUNTANT USE ONLY</u>

Employee's FTE _____ Date Employed _____ Verified by Human Resources _____ Date _____

$ Amount Applied to Student Account _____ Applied by Financial Aid or Accountant _____ Date _____

PROCEDURE LIT.5.04.02
EMPLOYEE EDUCATION AND TRAINING PLAN

SCOPE: Faculty and Staff

1. Purpose: The Employee Education and Training Plan ("the Plan") provides employees of Lamar Institute of Technology (LIT) with assistance in obtaining additional college-level education and training to increase their value to LIT. The Plan is intended to operate such that payments made under it qualify, in the case of undergraduate or graduate classes required in a degree plan, as qualified tuition reduction under Section 117 of the Internal Revenue Code; or, for all other courses, as business expenses for courses related to the employee‘s present position, under Section 162 and thus excluded from taxable income under Section 132(d). As such, the Plan represents an internal administrative procedure for LIT. It is not intended to operate as a fringe benefit plan under Section 127 of the Internal Revenue Code.

2. Definitions:

   2.1. Benefits-Eligible Employee: Any employee defined as a regular full-time employee by the Teachers Retirement System of Texas is a Benefits-Eligible Employee. This includes all persons employed for a definite period of at least four and one-half months or one long semester at a workload not less than one- half of the standard workload, excluding those employees who are required as a condition of employment to be enrolled as students.

   2.2. Course: Any course offered by an accredited college or university for which academic or technical credit is awarded upon successful completion of the course. The term “course” shall include any associated laboratory or other practical instruction only if such instruction is an integral part of the course and is not separately numbered. The term course shall include “Developmental” and “Pre-Collegiate” courses and laboratories that are offered on a regular basis by an accredited college or university and published in its official undergraduate or graduate academic catalog

   2.3. First Class Day: For a class offered under any regularly published semester or term schedule, the official “first class day” established for that semester or term regardless of the actual date of the first meeting of the specific class. For any class for which an official “first class day” is not established or cannot be determined under the preceding definition, the date of the first scheduled meeting of the class.

   2.4. Standard Workload: The standard workload for an employee (100% FTE) shall be the workload defined in State law or regulation as the standard workload. If no such definition is available, the percent FTE reported for that employee to the Texas Higher Education Coordinating Board in accordance with LIT rules and procedures shall be used for purposes of the Plan.

3. Eligibility:

   3.1. A Benefits-Eligible Employee is eligible to make application for payment under the plan for any course, the first-class day of which falls on or after the day that the employee has been a Benefits-Eligible Employee for a continuous period of six (6) calendar

months.

3.2. An employee whose application contains significantly incorrect information, who violates the provisions or procedures of the Plan, or who fails to complete his or her obligations under the Plan, may be declared ineligible for any subsequent participation in the Plan.

4. Payments:

4.1. Payments for an approved undergraduate or graduate course shall not exceed the current cost of assessed tuition and fees for Lamar University. Payments will be made, subject to the other provisions of the Plan, for any course or degree plan that is directly related to the employee's current position, enhances the employee's ability to perform in their current position, or prepares the employee for a future position at LIT. Courses that do not support one or more of these business-related purposes are not eligible for tuition assistance under this Plan.

4.2. Payments will be made, subject to the other provisions of the plan, for no more than two (2) courses in each of the Fall and Spring semesters, and one (1) course during the Summer term. Courses are non-transferable to future semesters should an employee enroll in less than the two allowable courses per semester.

4.3. Payments are applicable only to the course for which approval was granted. A new application must be fully approved before a different course may be substituted for the originally approved course under “drop and add” procedures.

4.4. If an employee has previously been the beneficiary of payment under this plan for a course, payment will not be made a second time for the same or an equivalent course, except when the course was officially dropped (or the student officially withdrew) owing to documented medical causes or at the request of the employee‘s supervisor on account of workload considerations.

4.5. Payments will be made, subject to the other provisions of the Plan, for no more than five (5) courses per academic year (nominally September 1 through August 31) for any employee. Payments will be made during summer terms for eligible employees even though they are not employed during the summer months if such employees are benefits-eligible during the semester immediately preceding the summer, unless they have resigned, or their employment has been permanently or indefinitely terminated.

4.6. Mini-sessions may be approved for payment; however, they will not be approved for absences from work.

4.7. The maximum payment for any one course shall comprise tuition and all fees associated with the course. In the event that an employee is enrolling in more than two courses at an accredited college or university during the same fall or spring semester (one during the summer), the employee shall pay the incremental charges for tuition and other fees resulting from the additional course(s). Payments will not be made for any deposits or other charges which are refundable at the end of the course or subsequently.

4.8. Payments for courses taken at a Lamar Component will be paid directly to the college or university. Payments for courses taken at another accredited college or university

will be reimbursed upon successful completion at a rate not to exceed the current Lamar University required tuition and fee rate for an equal credit hour course.

4.9. Travel expenses will not be reimbursed under this Plan.

4.10. Refunds for dropped or withdrawn from accredited college or university courses will be refunded back to the account from which they were paid.

4.11. In order to conform to IRS regulations and guidance, payment will be made for Physical Activity Courses (PEGA or PHED prefixed courses) only to the extent that such courses are required for graduation.

5. Availability of Funds for the Plan: Payments under the Plan are subject to funds being available in the LIT budget. Lamar Institute of Technology is not required to make any funds available in any given fiscal year. In the event that funds available in any given year are not sufficient to fund all applications for payments, approved applications shall be funded in order of receipt by the finance office of the employing component until available funds are exhausted.

6. Applications for Payment: An employee applying for payment under the Plan must complete the appropriate application form and submit it to his/her supervisor and appropriate Vice President (as indicated on the form) for approval of the course to be taken. The supervisor or appropriate Vice President may decline to approve payment for a course if the employee is not in good academic standing, not making satisfactory academic progress as defined in the rules governing federal student financial aid, or if it is determined that the course or degree plan is not directly related to the employee's current position, does not enhance the employee's ability to perform in their current position, does not prepare the employee for a future position at LIT, or does not provide a demonstrated benefit to LIT. The application shall then be submitted to the Human Resources Office. Payment will be authorized only after completion by all administrative offices.

7. Plan Administration/Release Time:

7.1. Nothing in the Plan shall in any way modify or waive any accredited college or university entrance or other academic requirements or course prerequisites.

7.2. Approval of payment under the Plan does not constitute approval to be absent from assigned duties during normal working hours.

7.3. With the employee's supervisor and those above the supervisor's approval, release time for one class may be granted. Release time is not to exceed the time required for one course. An employee may take only one course a semester during the employee's scheduled work day.

7.3.1. Permission to be absent from assigned duties will only be granted if the designated course is not available after work hours.

7.3.2. Variation in a work schedule or flex-scheduling is not permitted solely for an employee to take a course. Flex-scheduling is to be used only when it improves or benefits the operation of the department or office.

7.4. Permission to be absent from assigned duties is at the sole discretion of the employing

institution. Nothing in this policy shall be construed as requiring any administrator or supervisor to approve release time during normal working hours. Supervisors and administrators may treat each application for release time based on the particular expertise, duties, and responsibilities of the individual employee involved, even though this may result in some employees being permitted release time and others not.

7.5. Release time under this plan shall not be used for prerequisite testing, advisement, or other non-instructional activities.

7.6. Nothing in the Plan shall be construed as prohibiting LIT from making payment outside this plan for any course or training for any employee when taking such course or training is initiated by a supervisor or administrator.

7.7. Completed applications must be in the Human Resources Office on or before the “first class day” of the semester as defined in subsection 2.3 of this procedure.

8. Repayment

8.1. Employees who receive tuition assistance under this policy must remain employed with LIT for a minimum of 12 months following the successful completion of the course(s) funded by the organization. Employees who voluntarily resign or are terminated for cause before fulfilling this twelve (12)-month service commitment will be required to repay the tuition assistance received, unless otherwise approved by the President.

8.2. Repayment may be deducted from the employee's final paycheck to the extent permitted by applicable federal, state, and local law. If the final paycheck is insufficient to cover the repayment amount, the employee remains responsible for reimbursing the outstanding balance.

8.3. Lamar Institute of Technology reserves the right to waive repayment requirements in cases of involuntary termination without cause, position elimination, disability, death, or other circumstances determined appropriate at its sole discretion and approved by the President.

Related Policies: LIT.5.04 Employee Development

Relevant Forms/Documents: Faculty/Staff Course Enrollment Form

Relevant TSUS Policies/Forms/Documents: TSUS Rules and Regulations Chapter 5 Section 6

Relevant Statutes: Texas Government Code Chapter 656, Subchapters C&D

Relevant SACSOC Standards: 6.5

Document History:
Adopted:
Reviewed:
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