

SPOUSE AND DEPENDENT WAIVER PROGRAM
CRITERIA and PROCEDURES

1. A full time (benefits eligible) Shepherd University employee who has been employed no less than six months with the University may apply for a Spouse and Dependent Waiver. A Spouse and Dependent Waiver is a waiver of tuition and other enrollment fees that are applicable to all undergraduate enrolled students at the University. The Beneficiary of the Spouse and Dependent Waiver must be the legal spouse or a dependent of the employee. A dependent is any person listed as a dependent on the Federal Tax Return for the preceding calendar year.
2. The Beneficiary must be an enrolled or admitted undergraduate degree-seeking student. The application for a waiver shall be for up to three* [see also paragraph 7] credit hours per semester (fall and spring) at the in-state rate, regardless of residency status. The amount of the waiver is only at the in-state rate; therefore out of state students will owe the difference between in-state and out of state tuition. Waivers for summer semesters will be considered only if funding remains after fall and spring awards are made. Waivers are applied only to classes that are for baccalaureate-degree credit.
3. A continuing or transfer student must have a cumulative GPA of 2.0 or higher to be an eligible Beneficiary. A student that is on disciplinary probation due to misconduct is ineligible for a Spouse or Dependant Waiver while in probationary status.
4. The Beneficiary must have a completed FAFSA on file with the Office of Financial Aid for the academic year of application. All federal, state and private grants and scholarships are awarded in advance of waivers under this policy. Beneficiaries cannot receive a combination of aid over the cost of attendance through the use of this waiver.
5. The application for this waiver must be submitted by the employee to the Office of Human Resources not later than August 1 for the Fall 2009 Term. Thereafter, applications must be submitted by December 1 for each Spring Term and by July 1 for each Fall Term. Each April, the Office of Human Resources shall announce by email alert to employees whether any waivers are available for Summer Terms. If Summer waivers are available, the application deadline is May 1.

6. When an employee files an application for a Spouse and Dependent Waiver, the employee must provide documentary proof of legal marriage or copies of the prior year tax return, regarding dependents.
7. After the application deadline, the Office of Human Resources will refer all completed applications from eligible employees to the Office of Financial Aid, which will determine the total number of Beneficiaries who are eligible for a waiver along with the total amount needed to waive three credits per Beneficiary at the in-state rate. If the total waiver amount for a Fall or Spring Semester is less than \$12,500.00, then all eligible Beneficiaries will receive a waiver; however, if there are more eligible Beneficiaries than the budget allocated for the semester, then \$12,500 shall be distributed among the eligible Beneficiaries proportionately. If any funds from a semester budget are not used, they shall roll forward to the following summer for any applications for summer terms. Any remaining funds thereafter are returned to general institutional reserves.
8. The Spouse and Dependent Waiver program is initially designated as being for up to three credit hours because of the limited funds available for the program and the expected scope of participation by employees. However, for any term in which the Office of Financial Aid determines that a substantial amount of funds would go unused, the Director of Financial Aid shall have discretion to either reallocate funds to current-Term beneficiaries in excess of three credit hours or to roll the surplus funds forward to the following Summer Term.