

# TUITION EXCHANGE BENEFIT

## General Information

- Before starting to explore these benefits, please make sure that any of your dependents that are looking to utilize the tuition exchange benefits have been approved through HR. This is done by submitting the eligibility [form](#) to HR along with any required supporting documents.
- Per HR eligibility requirements, the tuition benefit for employees of John Carroll University can be utilized in 2 ways:
  - Receiving the benefit for full tuition for courses taken at John Carroll
  - Receiving the benefit through 1 of 3 tuition exchange programs in which John Carroll participates
- The process for each is different. This information pertains to the exchange programs. For information regarding utilizing the tuition benefit overall, please visit:  
<http://sites.jcu.edu/hr/pages/resourcespolicies/benefits-policies>
- Utilizing the benefit through an exchange program does not preclude you from also receiving the benefit for JCU courses (example: attending another institution through an exchange program but looking to take summer courses at JCU)
- Receiving the benefit through one of the exchange programs **IS NOT GUARANTEED!** It is a competitive process at each school, and each school has its own criteria for selecting recipients as well as a certain number of awards to grant.
- Employees of John Carroll are always welcome to utilize the expertise of JCU's enrollment staff for help and advice during their own college search process. Representatives would be happy to discuss with you how best to conduct a college search, what colleges look for in applications, writing a college essay, the financial aid process, and many more topics. For help, as well as for any questions on the tuition exchange process in general, please contact Steve Vitatoe, Assistant Vice President for Enrollment Operations & Analytics.
- You should feel free to ask questions about the exchange process, selection criteria, timeline, number of awards granted, etc. from each individual school you are considering. Although the exchange liaisons at each school vary in title (individual may be from academic affairs, admission, financial aid, registrar, human resources, president's office, to name a few), admission representatives at each school should be able to answer the basic questions about their exchange programs.
- Although all schools can differ in process and timeline for these programs, and each of the 3 programs themselves can differ, it is highly recommended that, if you are applying as a new student for the first time, your certifications for any of the programs are received by any schools you are considering no later than December 1 if you plan to start the following fall semester.
- As these programs are competitive, and the chances of being awarded this benefit will vary school to school, it is recommended that you not "put all of your eggs in one basket." Be sure to look at a range of schools. Although not a hard rule, in general the following seems to apply: the more competitive the

school is in terms of admission as well as the more popular and desirable the school may be, the harder it will be to receive the benefit at that school.

- Many institutions are in multiple exchange programs, as are we. So, if you are looking at a school in more than one of the programs, be sure to send your certification to that school through each of the programs in which they participate. This can help your chances of receiving the benefit at that school.
- Please keep John Carroll's tuition exchange liaison, Steve Vitatoe, informed of your individual process and plans. If you choose to accept the benefit and enroll at a given school, please notify Steve of the school AND the program through which the student will be receiving the benefit. If you withdraw or transfer to another institution, promptly notify Steve. This information is very important for John Carroll's accurate standing in the programs in terms of balance (how many students we export to other institutions through each program vs. how many students we accept to JCU through each program).
- Those receiving the benefit do not need to submit a certification form every year. With all necessary information included in your HR Banner employee record, your recertification for the next academic year will automatically be sent each February to the institution each year the student remains in the program. HOWEVER, HR may request updated documentation for proof of dependency each year for their records.

### **General Timeline**

#### **HS junior year into fall of senior year**

- Research colleges for "fit."

#### **September – December of senior year**

- Apply for admission.
- Review financial aid procedures for schools.
- Complete and submit the Tuition Exchange Certification Forms online (one for TEP/FACHEX and one for CICTEP).

#### **October of senior year**

- Complete Federal Aid forms (FAFSA); most schools require this for the TE programs.

#### **January – April of senior year**

- Financial aid award packaging begins. Majority of TE offers are communicated by each institution.

#### **May of senior year**

- May 1 – National Candidate's Reply Date.

## **The Council of Independent Colleges Tuition Exchange Program (CIC-TEP)**

The [CIC Tuition Exchange Program \(CIC-TEP\)](#) is a network of CIC colleges and universities willing to accept, tuition-free, students from families of full-time employees of other CIC-TEP institutions. CIC-TEP was planned and developed more than two decades ago with a goal of creating a true-access program, without any costly fees or cumbersome credit-debit limitations. Each participating institution in the network agrees to import a limited number of students on the same admission basis as they accept all other students, without regard to the number of students it exports. The minimal import requirement is three new students a year.

With a current membership of over [450 participating institutions](#) in CIC-TEP, participation is at its highest level yet, allowing for a large selection of institutions.

### **FAQ's:**

- **What is covered under the CIC-TEP benefit?**

All CIC-TEP recipients receive a full-tuition remission benefit. Students are responsible for all non-tuition charges—room, board, and fees—at the institution in which they enroll (host/importing institution).

- **Who is eligible for the benefit?**

This program may be used by any full-time employee at a participating institution. This approach is both nondiscriminatory and in compliance with IRS Regulations. Eligible students are dependents (equivalent to the IRS definition of a dependent), spouses, or full-time employees. Employees should contact the TEP liaison at his/her home institution for specific eligibility guidelines. Student applicants must be admissible at the host/importing institution in accordance with regular institutional admission standards and must comply with all of the host institution's financial aid policies and procedures. Applicants must maintain good academic standing and satisfactory academic progress.

- **Should I apply for college admission before, after, or simultaneously with applying for the TEP benefit?**

Students should apply for college admission simultaneously with applying for the TEP benefit.

- **Am I guaranteed to be accepted into the program at the schools of my choice, or at any school in the network?**

NO. All schools in the consortium must accept three new students a year minimally. Some schools accept more. However, most schools receive applications from many more eligible students than they have spots to fill. Each school is different, and you are encouraged to contact individual schools of interest for more details on their process and how many students they accept.

- **Once I'm accepted into the program, is my renewal guaranteed?**

While students usually receive the benefit for four years, it is not "guaranteed." The student must continue to meet the college's academic standards, both schools must remain as participants in the program, and the employee must continue to meet the eligibility requirements of the benefit. Students in good standing are automatically eligible for up to three years of annual renewal of tuition remission for undergraduate study (for a total benefit of four years).

- **Does being a TEP recipient guarantee (or affect) my admission to the college?**

No, the benefit should have no effect on admission to the college.

- **How is "dependent" defined?**

"Dependent" is generally defined using the Federal tax definition. However, with divorces, deaths, etc., exceptions are sometimes made at the discretion of the exporting institution. When in doubt, contact your institution's liaison officer.

- **What happens to the other types of financial aid that I receive?**

The complex nature of financial aid programs requires that many factors be taken into consideration. If the aid program is specific to tuition, the student may not obtain additional money (since TEP covers full tuition). If however, the aid can be used for other educational expenses, it is at the discretion of the college to allow the additional aid to offset the TEP benefit or to be in addition to the TEP benefit.

- **I was told I am eligible for the TEP benefit. Should I expect something in writing from the host institution?**

Yes, you should expect a formal letter from each "importing" institution that you notify of your eligibility which outlines the value of the benefit and any terms and conditions for receipt and/or continuation of the benefit.

**Procedure:**

1. Employees must first make sure that any of their dependents that are looking to utilize the tuition exchange benefits are listed in your personnel record in Banner through HR. If they are not, please submit this [form](#) to HR.
2. Complete and submit the [CIC-TEP Application Form](#).
3. Enrollment operations then enters the application information into the CIC-TEP online system, which notifies the liaison at each of the institutions to which the student is applying.
4. The student applies for admission directly to the institution(s) of his or her choice and submits all required financial aid information for each school.
5. For new applicants, the office of admission of the host/importing institution informs the student of her/his acceptance to attend the institution.
6. For renewal applicants, the host/importing institution determines whether the enrolled student is maintaining good academic standing and satisfactory academic progress.
7. The liaison officer of the host/importing institution informs the student of his/her acceptance into/renewal of CIC-TEP grant.
8. Review the award notification carefully. It will specify the amount, duration and conditions of your grant, along with details about the institution's charges. Be sure you understand any charges you're responsible for and any requirements you must meet to continue receiving the grant in the future.

## **FACHEX (Jesuit Colleges and Universities Consortium)**

- 27 of the 28 U.S. Jesuit colleges participate – Georgetown does not.
- The grant covers full tuition only; a few schools charge an administrative fee per semester or per credit hour for utilizing the grant.
- Some of the schools will only consider incoming freshmen for the grant; a little more than half of the schools will consider transfer students.
- Number of grants offered per school completely varies school-by-school and year-by-year; each school is different, and you are encouraged to contact individual schools of interest for more details on their process and how many students they accept.
- Good academic standing usually required to maintain.

### **Procedure:**

1. Employees must first make sure that any of their dependents that are looking to utilize the tuition exchange benefits are listed in your personnel record in Banner through HR. If they are not, please submit this [form](#) to HR.
2. Complete and submit the [FACHEX/TEP EZ Online Application](#). This form automatically enters the application information into the FACHEX/TEP online system, which notifies the liaison at each of the institutions to which the student is applying.
3. The student applies for admission directly to the institution(s) of his or her choice and submits all required financial aid information for each school.
4. For new applicants, the office of admission of the host/importing institution informs the student of her/his acceptance to attend the institution.
5. For renewal applicants, the host/importing institution determines whether the enrolled student is maintaining good academic standing and satisfactory academic progress.
6. The liaison officer of the host/importing institution informs the student of his/her acceptance into/renewal of FACHEX grant.
7. Review the award notification carefully. It will specify the amount, duration and conditions of your grant, along with details about the institution's charges. Be sure you understand any charges you're responsible for and any requirements you must meet to continue receiving the grant in the future.

## **The Tuition Exchange Program (TEP)**

The [Tuition Exchange](#) opens doors and creates opportunities through our reciprocal educational grant program.

Chartered in 1954, started with the support of TIAA/CREF and launched with funding from the Ford Foundation for the Advancement of Higher Education, The Tuition Exchange is the oldest and largest program of its kind in the U.S. – some 672+ members strong! And we continue to grow – adding an average of 20 new schools annually.

**Membership:** More than 672 private and public not-for-profit colleges and universities, representing almost every state, the District of Columbia, and several other countries. Some of the nation’s most prestigious institutions are among our members. For a complete list of members, click [here](#).

**Grants:** The Tuition Exchange grants are competitive awards and **are not guaranteed**. Applicants need to inquire about individual TE application dates and processes at both the place of employment and where the student is seeking a tuition exchange award.

The value of the TE scholarship is tuition or the annual set rate. Be aware that TE funding may include federal and state grant dollars, as well as any institutional scholarships, co-curricular awards, and institutional grants. Set rate is adjusted annually. For 2017-18 the set rate is \$35,000. Check with your Import school for their TE grant maximum. Tuition Exchange allows member schools flexibility in providing funds beyond the required set rate.

### **FAQ’s:**

- **Who is eligible?**

Eligibility is determined by the employing institution (also called the “home” institution). The school may set requirements for employment status, years of service, or priority status, or set limits on the number of students eligible per family. Ask your Liaison Officer for eligibility guidelines, often published in employee benefit guides or on an internal web site.

- **Are all eligible students guaranteed a grant?**

No. The Tuition Exchange grants are not guaranteed; they are competitive awards for which you apply. Each institution must maintain a balance between students sent to other schools on the exchange (exports) and students received on the exchange (imports). Members also are required to set up a mechanism to establish priority for exports. When there are many more exports than imports, the institution may not sponsor new students. These factors may affect your ability to earn a grant through the exchange.

- **How competitive is the award process?**

Tuition Exchange grants are competitive. Of course, you'll need to first meet the school's admission requirements and applicable deadlines. Some member schools have additional requirements for exchange applicants, such as higher academic standards; others limit awards to just a few new students each year. You'll increase your odds of receiving a grant if you apply to one or two schools that offer awards to a large percentage of applicants. To find out the award percentage for a particular school, visit [here](#).

- **At what point in the grant application process should I apply for admission to the colleges I select?**

You should apply for college admission simultaneously with applying for a Tuition Exchange grant.

- **How many semesters does the grant cover?**

Most grants cover four years (eight semesters) of undergraduate education. Institutions have the right to offer grants for less than four years. Some schools allow grants to be used for professional and graduate study.

- **What must I do to retain my grant?**

You must meet the institution's standards for academic performance and personal conduct and any other terms and conditions of the grant. Those requirements vary by school. Also, the family member whose employment enabled eligibility must continue to meet the home institution's eligibility criteria. Your home institution will process a recertification of eligibility each year.

- **What is the dollar value of Tuition Exchange grants?**

The value of the TE scholarship is tuition or the annual set rate. Be aware that TE funding may include federal and state grant dollars, as well as any institutional scholarships, co-curricular awards, and institutional grants. Set rate is adjusted annually. For 2017-18 the set rate is \$35,000. Check with your Import school for their TE grant maximum. Tuition Exchange allows member schools flexibility in providing funds beyond the required set rate. Notification of your award should provide specific details. If you're unsure, ask the school to clarify before you accept the grant.

**Procedure:**

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2. Complete and submit the [FACHEX/TEP EZ Online Application](#). This form automatically enters the application information into the FACHEX/TEP online system, which notifies the liaison at each of the institutions to which the student is applying.
3. The student applies for admission directly to the institution(s) of his or her choice and submits all required financial aid information for each school.
4. For new applicants, the office of admission of the host/importing institution informs the student of her/his acceptance to attend the institution.
5. For renewal applicants, the host/importing institution determines whether the enrolled student is maintaining good academic standing and satisfactory academic progress.
6. The liaison officer of the host/importing institution informs the student of his/her acceptance into/renewal of TEP grant.
7. Review the award notification carefully. It will specify the amount, duration and conditions of your grant, along with details about the institution's charges. Be sure you understand any charges you're responsible for and any requirements you must meet to continue receiving the grant in the future.