

Norwich University Human Resources Tuition Exchange Benefit Checklist

- Visit the HR forms page for information related to tuition benefits in the spring or early summer prior to submitting an application. Contact HR (Ext. 2084) with any initial questions regarding the process.
- Research the Tuition Exchange Program (TEP) and Council of Independent Colleges (CIC) web sites for information on member schools.

Web sites: www.tuitionexchange.org and www.cic.edu

- Seek application and admission materials from desired schools, including Norwich University.
- Attend a tuition exchange informational meeting as scheduled – late August or early September – scheduled date to be determined and posted on my.norwich.edu
- Complete and return application for tuition exchange to Tracey Mingo, Director of Student Financial Aid, no later than September 30.
- October 31 - notification of status and ranking.
- January 1 – if offered, determine whether you will accept the benefit or not. Keep in mind that the final determination is made by the receiving school and its admissions and financial aid process. Final notification and confirmation will occur between March and the end of May.

Norwich University Tuition Exchange Application

I hereby request certification of my child to the institutions listed below as an applicant for a scholarship under the Tuition Exchange program. I am eligible for employee benefits at Norwich University, and I understand the policies governing this program. I have read the dependency requirements on the reverse and certify that my child does meet the requirements for dependency.

Employee Signature

Date

Please provide the following information:

Academic Year Applying for: _____

Student First Name: _____

Student Last Name: _____

Last four digits of Student SSN: _____

Student e-mail: _____

Telephone: _____

Permanent Address: _____

Parent/Guardian Name: _____

Parent e-mail: _____

Parent date of hire at Norwich: _____

Number of Academic Years Applying for: _____

Number of Semesters Applying for: _____

Class Year in College of Student: _____

List participating schools where student will apply: (Please do not abbreviate college names)

College(s) Name(s)

State College Located In:

Return Application to Tracey Mingo, Student Financial Planning Office, no later than September 30

The Tuition Exchange Program is only available to children who are legal dependents of eligible employees. The IRS applies five tests to determine if an individual qualifies as a taxpayer's dependent. All of these conditions must be met to qualify as a dependent.

1. Relationship. The person must be the taxpayer's relative, e.g., child, mother, father, grand-parent, great-grandparent, brother, sister, grandchild, great grandchild, half-brother or sister, stepbrother or sister, stepmother or father, mother or father-in-law, brother or sister-in-law, daughter or son-in-law, uncle, aunt, nephew, or niece; or have lived in the employee's home as a member of the family for the whole year.
2. Married person. If the person is married and files a joint return, the taxpayer cannot claim him or her as a dependent unless the joint return was filed only to get a refund of all taxes withheld.
3. Citizen or resident. To be claimed as a dependent, the person must be a citizen or resident alien, a resident of Canada or Mexico, or an alien child adopted and living for the entire year with a U.S. citizen in a foreign country.
4. Income. The person's gross income must be less than \$2,500 unless the dependant is a child (e.g., son, daughter, stepson, stepdaughter, adopted child, or foster child) who is under age 19 or a full-time student (i.e. enrolled as a full-time student for at least five months during the year) under 24.
5. Support. The dependent must have gotten more than half his or her support from the taxpayer/employee.

In order to process the tuition scholarship application for your child, please sign below to certify whether he or she meets the above requirements for dependency.

I certify that my child, _____, (does) (does not) meet the requirement for dependency. circle one

Signature

Date



Norwich University
Tuition Exchange Scholarship Program Policy
July 31, 2008 INTERIM

Norwich University participates in two programs that provide tuition scholarship opportunities for dependent children of eligible faculty or staff members at participating institutions. The programs are limited to undergraduate programs only.

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

This program includes over 350 colleges and universities throughout the United States. Each participating institution is required to provide three scholarships per year for students from participating schools. There is no limit on the number of dependents of our faculty or staff members attending other institutions.

This program is available to all dependent children of employees who are eligible for tuition scholarships at Norwich University. Non-exempt employees must have one year of service at the time of application for the program. The student must apply for admission to the participating school, and submit any required financial aid information. Any financial aid awards must be submitted to the host school. The student must also request a CIC-TEP Student Application Form from the Norwich University Financial Aid Office, which we will send to the Liaison Officer at the host institution.

The Tuition Exchange, Inc. (TE)

This program is the oldest exchange program of its kind in the United States, and includes over 580 participating institutions. Norwich University's access to the program depends on a rolling five year accounting of imports and exports. If our exports exceed our imports by more than 100%, we are restricted from exporting any new students until the balance is below that level.

This document will continue our long-standing practice that eligibility for the program is limited to dependent children of employees with at least five years of benefits eligible service, and the number of exports from Norwich University may be limited in any one year. The decision on the number of exports authorized each year will be made by the Director of Human Resources, based on the balance of imports and exports as of October 1. Norwich approval for exports will be awarded based on the faculty or staff member's length of service with Norwich University, first for faculty or staff members who have not previously benefited from the program, and then for faculty or staff members who have previously had children enrolled through this program. In the case of faculty or staff members with the same employment date, any necessary selection will be made by lottery. If the number of eligible applicants exceeds the number of available awards, the remaining applicants will be placed on a waiting list. Any Norwich export awards that are not used by the original award recipients will be offered to those on the waiting list in the order described above.



Policies and Procedures for Both Programs

1. Each program has a required application form that can be obtained from the Student Financial Planning Office. Applications will be accepted each year beginning on September 1. The application deadline is September 30. The application must be filed in the academic year preceding the academic year for which the scholarship is sought. For example, the application must be submitted by September 30, 2008, for the 2009-2010 academic year.
2. To be eligible, the student must be a dependent child of an eligible faculty or staff member employed by Norwich University. "Dependent" means eligible and claimed as a dependent by the faculty or staff member for United States income tax purposes.
3. For the TE program, applications will be ranked based on the length of service of the eligible faculty or staff member, first for children of faculty or staff members who have not benefited from the program, and followed by children of faculty or staff members who have previously had any children enrolled through the program. The number of TE exports awarded each year will be determined by the Director of Human Resources based on the balance of imports and exports as of October 1. We have not needed to limit the number of awards under the TE program in most years in the past. Whenever the number of awards is limited, the remaining applicants will be placed on a waiting list. Any scholarships that are not used by the original award recipients will be offered to those on the waiting list in the order described above. Because these scholarships are dependent on admissions and tuition exchange program decisions at other institutions, final decisions on waiting list applications are likely to be made in May.
4. Students must meet the admissions requirements at the institution they are seeking to attend, and must complete all admissions procedures required by that institution. Students who are approved for the scholarship by Norwich in October will also need acceptance by the host institution. Students should notify the liaison officer at Student Financial Planning whether they intend to accept the scholarship as soon as possible after acceptance by a host institution. Students on the tuition exchange waiting list should also apply to the host institution they would like to attend in order to preserve the possibility of a scholarship. For students on the waiting list, acceptance by a host institution does not guarantee that the scholarship will be approved by Norwich University, unless a scholarship becomes available.
5. Norwich University assumes no liability for educational expenses under these programs. Parents assume financial responsibility for all charges that are not covered by these programs, which may include fees, room and board charges, and any portion of the tuition not covered by the scholarship. Norwich University assumes no responsibility for any educational expenses should either or both of these programs be suspended or terminated. Scholarship benefits under these programs are not guaranteed, and are dependent on the University's election to continue to participate.
6. Access to these programs ends when the faculty or staff member ceases qualifying employment with Norwich University. In the event that employment ends after a term begins, the student will be



allowed to continue until the end of the term in progress. In the event that employment ends due to retirement, death, or disability, after the beginning of an academic year, the student will be allowed to continue until the end of that academic year.

7. Scholarships are provided only for undergraduate education toward an initial baccalaureate degree. Normally, the scholarship will continue for four academic years, as long as the student remains a dependent child of an eligible faculty or staff member, and makes satisfactory academic progress, and the university chooses to continue its participation in the program. The faculty or staff member must formally reapply for continuation of the scholarship each year.

8. The University retains the right to amend this policy or discontinue participation in either of the exchange programs at any time. Should the University decide to discontinue participation in either of the programs, the University will strive to allow any current scholarship recipients to complete the normal period of the scholarship under the same terms and restrictions as if the University's participation in the programs had continued.