University of Idaho
2012-2013 FACULTY SENATE AGENDA

Meeting #6

3:30 p.m. - Tuesday, October 2, 2012
Brink Hall Faculty Lounge
IWC Room 390 – Boise
213 – Coeur d’Alene
TAB 321B IF4 – Idaho Falls

Order of Business

I. Call to Order.

II. Minutes.
   • Minutes of the 2012-13 Faculty Senate Meeting #5, September 25, 2012

III. Chair’s Report.

IV. Provost’s Report.

V. Other Announcements and Communications.

VI. Committee Reports.
   • Academic Petitions (Tallent)
   • University Budget & Finance Committee (Budwig)
   • University Curriculum Committee:
     o FS-13-006 (UCC-13-003): Master’s Degrees General Requirements (vote)
     o FS-13-007 (UCC-13-013): Final Exam Schedule (vote)

VII. Special Orders.
   • University Planning & Budget (Ickes)
   • Faculty-Staff Dependent Tuition Reduction (Davenport & Nutting)

VIII. Unfinished Business and General Orders.

IX. New Business.

X. Adjournment.

Professor Kenton Bird, Chair 2012-2013, Faculty Senate

Attachments: Minutes of 2012-2013 FS Meeting #5
FS-13-006; FS-13-007
University of Idaho
Faculty Senate Meeting Minutes
2012-2013 Meeting #5, Tuesday, September 25, 2012

Present: Aiken, Baillargeon, Baker (w/o vote), Bathurst, Bird (Chair), Cobb, Eckwright (w/o vote), Flores, Frey, Goddard, Hartzell, Hasko, Hopper, Kennelly, Manic (Idaho Falls), Miller, Morra, Pendegraft, Qualls, Wilhelm for Smith, Strawn, Teal, Ytreberg Absent: Budwig, Karsky, Ostrom, Safaii, Smith, Stuntzner

Guests: 6

A quorum being present, Senate Chair Bird called the meeting to order at 4PM.

Minutes: A minor edit was made to p. 3, line 2 of the September 18 minutes: “on so on” was edited to read “and so on.” It was moved and seconded (Cobb, Morra) to approve the minutes of meeting #4 with the suggested edit. Motion carried.

Chair’s Report. The Chair reported on the following items:

• Chair Bird and vice-chair Hartzell attended President Nellis’ fall leadership retreat last week. The retreat included informative sessions on campus safety and security, computer and networking security, a review of goals from President Nellis, reports from the vice presidents and other administrators, and a discussion about the relationships between enrollment, research and funding.

• Due to today’s shortened meeting, the next 3 meetings will have especially full agendas. Please be prepared to stay until 5PM or later. Preview of forthcoming meetings:
  • October 2. Keith Ickes, executive director for planning and budget, Dan Davenport, director of student financial aid, and Andrew Nutting, chair of the Student Financial Aid Committee, will report on the recently implemented dependent tuition reduction. Ralph Budwig, chair of the University Budget and Finance Committee, and Rebecca Tallent, chair of the Academic Petitions Committee, will present committee reports.
  • October 9. Rob Spear, Athletic Director, and John Hasko, senate representative on the President’s Athletic Advisory Council, will discuss athletics. Rodney Frey, director of general education, and Jason Porter, chair of the University Committee for General Education, will provide updates on U-Idaho’s general education.
  • October 16. Greg Walters, executive director of human resources (today’s guest), will return along with the Benefits Advisory Group (BAG).

• Dean Hoversten and the College of Art & Architecture will host the first faculty club of the academic year on Friday, September 28, from 4-6PM in the Commons Clearwater/Whitewater rooms.

• The Graduate and Professional Students’ Association invite all to attend their social this evening at Patty’s Kitchen.

Provost’s Report. Provost Baker reported on the following items:

• Dance students gave a wonderful performance at today’s memorial/celebration of life for Professor Greg Halloran. Members of Greg’s family were in attendance and very much appreciated the tribute to Greg, whose impact on the students was clearly very meaningful.

• The Staff Appreciation Fair is on Thursday, September 27, from 10AM-2PM in the SUB Ballroom. All are invited to attend and mix with staff and thank them for keeping the institution moving forward.

• This year’s Bellwood Memorial Lecture is on Thursday, October 4, at 3:30PM in the Administration Auditorium and features Kenneth R. Feinberg, a prominent lawyer and author.
who was instrumental in settlements relating to the Twin Towers and Deepwater Horizon. The lecture is free and open to the public. For more information:
http://www.uidaho.edu/law/newsandevents/signature/bellwood-lectures

- Gloria Steinem will be speaking at the University of Idaho ASUI Kibbie Dome on Thursday, October 4, at 7:30PM. For more information:
http://www.uidaho.edu/studentaffairs/womenscenter/40th-anniversary/gloria-steinem

Chair Bird next introduced Greg Walters, recently hired as executive director of human resources at U-Idaho, who will be talking about hiring, retention and training of employees, as well as criminal background checks. Suzette Yaezenko, director of employment services, accompanied Mr. Walters. Ms. Yaezenko began by explaining the new talent management system (TMS) which will replace the current applicant tracking system (ATS). Rationale for change:

- ATS is a homegrown system implemented in 2001.
- Number of “noncompliant” issues with current system:
  o Difficulty with meeting records.
  o Problems with keeping logs.
  o Difficulty with determining veterans’ preference.
  o Security concerns.
- TMS Vendor, PeopleAdmin, is the #1 vendor for higher education, with over 750 universities using it, including Idaho State University.
- TMS features:
  o Allows for full life cycle of a position, from creation of the position to recruitment, hiring and “onboarding” (i.e., organizational socialization) new employees into the institution.
  o Allows for integration with Banner, saving personnel resources.
  o Should allow for streamlined hiring of part-time and temporary help.

HR has been reviewing requirements of the new system for the past year and now has brought together a group to review system compliance.

After developing U-Idaho’s unique workflow in the system, HR’s “traveling trainers” will be meeting with anyone who would like to test it so that changes may be made before final implementation.

HR’s goal is to make the new system live in December 2012, at which time the old system will be archived for recordkeeping. Any searches in progress when the new system goes live will be completed in the old system.

Ms. Yaezenko and Mr. Walters responded to the following questions from senators:

In the past our college HR employees have changed decisions regarding applicant rankings made by our department chair. Will HR continue to second-guess faculty search decisions? I don’t know the answer but that will be discussed with the task force.
Will this change how students are hired? Yes, with the exception of work-study we handle student hires the same as we handle temporary hires.

Faculty applicants are surprised that the first question on the online form asks if the applicant is a convicted felon. Will we be able to customize the online form in the new system? Yes, we are looking at making 2 unique application forms, one for staff/non-faculty exempt and another for faculty positions.
Mr. Walters then provided a brief overview of the non-faculty reclassification/compensation task force objectives. Issues with current system include:

- U-Idaho currently utilizes hundreds of job titles, many with one or only a few incumbents.
- The system is broken for classified staff and it is nonexistent for exempt staff, resulting in inequities, salary compression, no logical career path for employees and other problems.

A successful classification system will:

- Group positions performing work at similar levels.
- Group positions by associated pay ranges, titles, system titles or classification.
- Make future reclassification much easier to manage and defend, so that fairness and equity issues can be addressed.
- Begin the conversation to look hard at pay practices, reclassifications and all related policies and procedures.
- Provide updated job descriptions.
- Enable U-Idaho to respond more quickly to reclassification requests in significant retention situations.

The reclassification/compensation studies will not:

- Measure workload.
- Measure work performance.
- Address organizational design issues.
- Individual pay rates will not go down as a result of these studies.
- The study is not intended to cause anyone to lose their jobs.

Steps in the process:

- The University of Idaho will develop a clear compensation philosophy, i.e., a formal statement documenting the institution’s position regarding employee compensation pay strategy and practices, and develop a framework for consistency. The university hired Sibson Consulting to conduct the studies, at a cost of $230,000 and paid by Finance and Administration.
- All staff will complete a position description questionnaire by mid-October to early November. HR will convert the results of the questionnaires to job descriptions for review by employees and managers.
- Sibson will put the results of the questionnaire into a logical progression on a continuum. Sibson will work with U-Idaho to select benchmarks and do salary surveys to find how we compare to external markets.

There will be few changes financially during the first year, typically adjustments and corrections take place over 3-5 years. FAQs and other updates will be available via the HR website.

Mr. Walters and Ms. Yaezenko responded to the following questions and comments from senators:

*Who is considered “staff” in this process? Are administrators “staff” or does the “staff” designation stop where “administration” begins?* It depends; some administrative positions are non-faculty, others are faculty. For example, President Nellis, Provost Baker, and deans are all faculty; vice-president Ron Smith is “staff.” This study will be top-to-bottom within staff positions.

*You mentioned that 60% of position titles have one incumbent. Can you give an example of a “1-off” job title?* The McCall Outdoor Science School Program Director is one. Some of these “1-off” positions are geographically specific, others are specific to a particular program within the university.

*Could it happen that a newly hired employee accepts a position with a certain title and then the position is reclassified with a different title and the accompanying pay range may increase or decrease?* Yes, you will see all kinds of examples.
Why is HR limiting reclassification requests? Is it just for this transitional stage as we move from one system to another? We do not want to be attempting to do reclassifications at the same time we are evaluating the entire system as this could lead to further problems and morale issues.

What is the timeframe on the study and implementation? The rolling-out phase begins in October with lots of activity in October and November. February and March will be “quiet” when the survey data will be reviewed and examined. Implementation date is July 1, 2013. The timeline will be available on the HR website.

Staff will be very nervous about this process even though you say there will be no jobs or salaries cut as a result of the study. Please provide constant communication throughout the process. We know that despite our reassurances this will be an emotional process for staff. We are committed to complete transparency and annoyingly frequent communications for the duration of this study.

TAs and RAs have slightly different job descriptions. How do they fit into this process? They are not part of this classification and compensation study.

What has become of the Hay classification system that the state of Idaho has used for so many years? The Hay system is an old industry evaluation system that the state of Idaho embraced 40 years ago and the new system will not use Hay points. Most institutions are moving away from the Hay system and since we are independent of Boise, our decision will not affect them in any way.

Mr. Walters next gave an overview of the proposed changes to procedures for criminal background checks:

- President Nellis had requested that changes be made to U-Idaho’s procedures as part of his efforts to create a safe campus environment.
- Criminal background checks currently are performed for all security-sensitive positions and all positions involving significant contact with minors.
- The proposed changes will require that background checks be performed for finalists in all faculty and staff positions.
- We will perform security checks for all other groups – temporary hires, interns, student workers and volunteers – for security-sensitive positions. Hiring authority makes the determination in these cases.
- The PeopleAdmin system will allow for background checks to be done online thereby speeding up the process and improving confidentiality.
- Suitability determination for job candidates will be centralized and made exclusively by HR.
- Changes to our procedures for criminal background checks will be reflected in the Administrative Procedures Manual (APM) 50.16. Changes will come to senate after General Counsel completes their review.
- U-Idaho currently runs about 500 background checks per year and we expect that to increase to approximately 1400/year.

Mr. Walters responded to the following questions from senators:

What are the advantages to having centralized decision-making regarding suitability? Centralizing this work ensures consistency. HR uses a weight test to determine suitability: if there is a crime in a candidate’s background we review how long ago it took place, whether the person fulfilled requirements imposed, what has happened since then, what is the relationship of the crime to the job,
and so on. Of course, there are hardline crimes that will be automatic disqualifications – felons, for example.

**Will the search committee be informed if a candidate is deemed unsuitable by HR?** This happens rarely, but in the event that a convicted felon applies for a job, for example, HR will speak with the search committee chair and state that the candidate cannot be hired for the position. Details of the candidate’s background are not shared.

**Who performs the background check?** The vendor and we also bill through the vendor.

**How much will these background checks cost the hiring units and how long does it take to get results? Do you also conduct international background checks?** Average price range is $35 per background check and most background checks are completed within 3 days. Our vendors are domestic and are not able to do international criminal background checks. Additionally, international checks are very pricey.

**How do you ensure that the information you receive from a background check is accurate?** Candidates who have adverse results in their background checks are provided that information and given the right to appeal. This does not prevent the university from going forward with the hiring process while the candidate files an appeal. The hiring authority will be given the choice of waiting 2-4 weeks for the outcome of the appeal or going with a candidate who was a second choice.

**What is the timeline for implementation of these changes?** The online part will become effective with PeopleAdmin implementation. The switch to performing background checks on all faculty and staff hires will happen as soon as General Counsel approves the changes to the APM.

**Do we run background checks on incoming students?** No, that is beyond our purview.

Mr. Walters encourages faculty and staff to contact him or Ms. Yaezenko with any questions or comments: gregwalters@uidaho.edu; suzettey@uidaho.edu

Mr. Walters then addressed a question he had received prior to the senate meeting regarding the availability of phased retirement for faculty and staff. The university recently renewed its planned retirement program for another 2 years. This is a 2-year program that enables faculty and staff to work .5 - .75 time in the first year and .5 time in the second year, while continuing to receive benefits at the rate of a full time employee. Provost Baker noted that staff should also discuss with their supervisor to see whether it will work within the context of their job. For more information use the “Planned Retirement Program” links at: [http://www.uidaho.edu/benefits/retirement/retiringfromtheuniversity](http://www.uidaho.edu/benefits/retirement/retiringfromtheuniversity)

**Adjournment:** It was moved and seconded (Bathurst, Baillargeon) to adjourn at 5PM. Approved unanimously.

Respectfully submitted,

Gail Z. Eckwright
Faculty Secretary and Secretary to Faculty Senate
Transfer, Correspondence Study, Non-degree Credit, and Over-aged Credit Limitation. The combined total of transfer credits, correspondence credits, non-degree credits, credits moved from an undergraduate transcript that were not used toward an undergraduate degree, and approved credits more than eight years old at the time the degree is awarded shall not exceed 12 credits for master's programs designated as requiring 36 or fewer credits, and shall not exceed one-third of the total credits in designated programs requiring more than 36 credits. The student's program may set a lower limitation. Credits can be transferred to UI, with the consent of the student's committee and the dean of the College of Graduate Studies, only if the institution from which the course credits are being transferred has a graduate program in the course's discipline or, should there be no graduate program in the course's discipline, if an exception has been granted by the dean of the College of Graduate Studies. All credits used toward graduate degrees must be from regionally accredited American institutions or from non-US institutions recognized by the appropriate authorities in their respective countries. Transfer credits are subject to all other Graduate College rules and regulations. Also refer to Subsequent Graduate Degree section.

Rationale: Currently, students are allowed to use up to 9 credits that were not used toward an undergraduate degree. This change would include these credits under the “12 credits rule” and treat them the same as other pre-graduate matriculation credits.
TO: University Curriculum Committee  
FROM: Office of the Registrar  
RE: 2013-2014 Final Examination Schedules  
DATE: September 19, 2012  

Note: These are being presented to the University Curriculum Committee as an informational item.

Final Examination Schedule  
Fall 2013-14

Regular classrooms will be used for the exam unless the instructors make special arrangements through the Registrar’s Office. In order to avoid conflicts, rooms must be reserved in the Registrar’s Office for “common final” exams. Instructors will announce to their classes rooms to be used for all sectioned classes having common final exams. No quizzes or exams shall be given in lecture-recitation periods during the week before the final examination week. Exams in lab periods and in physical education activity classes, final in-class essays in English composition classes, and final oral presentations in speech classes are permitted that week. Announcements of time and room should be made by the instructor for all exams. Instructors must meet their classes during the exam period for which they are scheduled in the final exam week, either for an exam or a final class session. Instructors may deviate from the approved schedule only upon recommendation of the college dean and prior approval of the Provost.

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Students with more than two finals in one day are permitted, at their option, to have the excess final(s) rescheduled to the conflict period or at a time arranged with the instructor of the course. Evening classes, those starting at 5:00 p.m. or later, will have the final examinations during the final exam week at the regular class time. Online classes, which have in person finals, will have the final examination the Saturday following the final exam week. For courses starting on the hour, final examinations should be scheduled using the earlier half-hour start time.

**Final Examination Schedule**

**Spring 2013-14**

Regular classrooms will be used for the exam unless the instructors make special arrangements through the Registrar's Office. In order to avoid conflicts, rooms must be reserved in the Registrar's Office for "common final" exams. Instructors will announce to their classes rooms to be used for all sectioned classes having common final exams. No quizzes or exams shall be given in lecture-recitation periods during the week before the final examination week. Exams in lab periods and in physical education activity classes, final in-class essays in English composition classes, and final oral presentations in speech classes are permitted that week. Announcements of time and room should be made by the instructor for all exams. Instructors must meet their classes during the exam period for which they are scheduled in the final exam week, either for an exam or a final class session. **Instructors may deviate from the approved**
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EXAMINATION DAY AND HOUR FOR CLASSES MEETING:

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At our first UBFC meeting we considered potential topics for the upcoming academic year. Here is the list of topics that was compiled and briefly discussed.

**UBFC Topics for 2012/2013**

- Budget and finance strategy at UI – review of Financial Critical Enabler and updates
- Performance based funding
- Enrollment workload funding
- Update on enrollment model strategy
- How does the State compensate UI per student (undergraduate, graduate, non-degree, etc.)?
- How does UI compensate colleges per student (undergraduate, graduate, majors, and non-majors)?
- Zero based budgeting mandate from DFM and SBOE
- Review of CEC done last year (FY12) and preview for FY13
- Shifting payroll to once a month or some other model. Moving from spread pay to another model.
- Classified staff – classification and compensation (task force update will be presented by Greg Walters at faculty senate on September 25th )
- P-Card accounts receivable for travel
- Update on Vandal Loan Fund
- TA and RA fees (review and update)
- Ability to retain funds for emergency repair and replacement of research equipment
- Anticipated mandatory cost increases and discretionary funds
Employee Dependent Tuition Waiver – FAQ

1. Who is eligible?
   a. Eligible Employee: Board appointed UI employee on regular appointment working at least half-time, including those on official leave. The employee must meet these criteria on the first day of the academic term.
   b. Eligible Dependent: Dependent meets the definition under current IRS Federal Income tax code (Title 26, Section 152) in relation to the employee. Please see the following link for current IRS code instructions defining dependents (http://www.law.cornell.edu/uscode/text/26/152). University of Idaho staff are NOT permitted to provide personal federal & state tax advice. Please see your personal tax advisor for eligibility assistance.
   c. Dependent must be a degree seeking graduate or undergraduate.

2. Who is not eligible?
   a. Multiple dependents of a household are not eligible in the same term.
   b. Dependents of temporary help (TH) employees, or employees that work less than half time.
   c. Dependents of Moscow Police Department employees.
   d. Dependents of the Associated Faculty. Associated Faculty as defined in 1565 F (affiliates/adjuncts) do not qualify for the benefit on the basis of their associated appointment. The primary employment appointment is used to determine eligibility. (For instance, dependents of ROTC affiliates are not eligible.)
   e. Dependents who do not meet the eligibility rules under the current IRS Federal Income tax code (Title 26, Section 152) in relation to the employee. Please see the following link for current IRS code instructions defining dependents (http://www.law.cornell.edu/uscode/text/26/152).

3. What is not eligible?
   a. The benefit does not include additional fees associated with specific courses (e.g., web-based courses), specific academic programs (e.g., professional fees, graduate fees), or specific services (e.g., insurance or student activities).
   b. The benefit does not apply to noncredit courses, intersession or summer session courses, continuing education courses, or courses offered through, but not limited to, Independent Study in Idaho, the College of Law, the Executive MBA Program, the Doctorate of Athletic Training, Professional Practices Doctorate, the McCall Outdoor Science School, or the WWAMI Medical Program.
4. If I accept an Employee Dependent Tuition Waiver, can I still utilize the University’s monthly payment plan to pay my share of tuition and fees?

   a. Yes. Students can set up a payment plan through VandalWeb, Student Account Information, Student Account Center, under the payment plan tab. For more information go to: http://www.uidaho.edu/controller/studentaccounts/paymentplans

5. If I am a part-time student, do I only use part of a semester of eligibility?

   a. No. Whether the student attends full time or part time, any semester for which the student in enrolled past the 10-day census date uses one of the eight allowed semesters.

6. What happens to my eligible semesters if I withdraw from the University?

   a. If you withdraw from all classes by the end of the second week of the semester you will receive a full refund of the tuition and fees you have paid and you will not have used a semester of eligibility for the employee dependent tuition waiver for that semester.

   b. If you withdraw from all classes after the second week of the semester, you will receive no refund of tuition and fees and that partial semester will count as one of your semesters of eligibility for the employee dependent tuition waiver.

7. What is the financial value of this waiver? Is the financial value reduced if I am less than full-time?

   a. For Fall 2012 and Spring 2013, the employee dependent tuition waiver for a full-time undergraduate student is worth $1,553.00 for each semester, which represents one half (50%) of resident undergraduate tuition and fees and will change in value from year to year as tuition and fee rates change. For graduate students taking 9 credits (full time for enrollment purposes), the waiver is worth $1,399.50. If the graduate student takes 10 or more credits, the waiver is worth $1,553.00.

   b. If during any eligible Fall or Spring Term you are an undergraduate and take less than 10 credits in a semester or a graduate student and take less than 9 credits in a semester, the waiver will be valued at 50% of the total student tuition & fees for that particular term.
8. How does this waiver affect other financial aid?

The Employee Dependent Tuition Waiver will be included in the student’s total financial aid award package as a financial resource which may require that federal aid be adjusted as a result of receiving an additional financial resource (including this waiver, scholarships, etc.) In addition, there are federal regulations and University policies that prohibit a student from receiving awards in excess of their total university-defined cost of attendance.

a. Financial aid from sources outside of the university as defined below is not affected by this employee dependent tuition waiver.

1. Outside agency scholarships/grants which are typically funded through community/civic organizations, private companies, some government agencies, e.g., AmeriCorps, National Science Foundation
2. Idaho State Board of Education Scholarships/Grants funded through the State of Idaho
3. Federal funds
4. Scholarships which are funded by gifts to the University of Idaho and processed through the University of Idaho Foundation (i.e. donor-funded University scholarships, e.g., Hamilton scholarship)
5. Institutional student loan programs

b. For aid programs funded by the institution from internal funds, an student should review their aid package and determine whether to use the Employee Dependent Tuition Waiver or previously offered institutionally-funded financial aid grant programs (includes undergraduate out of state tuition waivers and the WUE program for nonresident dependents). Scholarships funded externally (see list above in 8.a) do not require a separate decision. Generally, the student’s decision will be based on the total value of each award. The Employee Dependent Tuition Waiver for Academic Year 2012-13 is worth up to $1,553.00 per semester. If an employee dependent is offered institutionally-funded financial aid worth more than the waiver, there will likely be a financial advantage to accepting the institutionally-funded university aid and not using the Employee Dependent Tuition Waiver for that semester. If a student chooses the institutionally funded aid (and not the dependent waiver), the waiver can be deferred for use in a different semester in which there is an advantage for doing so. Before making your final decision, you may wish to consult with the Financial Aid Office to ensure you clearly understand the various benefits and restrictions applicable to each type of award.
9. How does the waiver work for graduate students?
   
a. Graduate students receive the same employee dependent tuition waiver as undergraduate students. This amount is equal to one half (50%) of the resident undergraduate tuition and fee rate per semester. For Fall 2012 & Spring 2013, graduate students taking 9 credits (full time for enrollment purposes), the waiver is worth $1,399.50 for a total of $2,799.00 for the full academic year. If the graduate student takes 10 or more credits, the waiver is worth $1,553.00 for a total of $3,106.00 for the full academic year.

b. The graduate fee is not included in the waiver.

c. Non-resident graduate students with appointments as Teaching Assistants or Research Assistants typically receive a University waiver for their non-resident fee as part of their appointment. They will continue to receive this out-of-state (OST) tuition waiver even if they choose to accept an Employee Dependent Tuition Waiver for part of their remaining tuition and fee bill.

10. Is the Employee Dependent Tuition Waiver taxable?
   
a. The Employee Dependent Tuition Waiver is considered tax exempt to the employee for undergraduate courses (100 thru 400 level). However, it is considered taxable to the employee for graduate courses (500 level & higher). Employees will be taxed for graduate courses for their Dependents’ Tuition Waiver through their UI payroll check. Please contact your personal tax advisor for advice on how this benefit will affect your federal and state income tax return.

b. With respect to the student, receiving benefits under the Employee Dependent Tuition Waiver Program is an annual reportable event to the IRS. Each student will receive a 1098T IRS form at the end of the calendar year to use in preparing their state and federal income taxes. Please contact your personal tax advisor for advice on how this benefit will affect yours or your student’s federal and state income tax return.

11. Whom do I contact with questions?
   
a. For questions related to employee eligibility, contact the University of Idaho Benefits center at (208)885-3697 or visit their office in the Human Resources building.

b. For questions related to application of financial aid, contact the University of Idaho Financial Aid Office at (208) 885-6312 or visit their office in the SUB.

c. For questions related to application of the benefit to the student’s account, contact the University of Idaho Student Accounts Office at (208)885-7447 or visit their office in the SUB.
INSTRUCTIONS

EMPLOYEE DEPENDENT TUITION FEE WAIVER APPLICATION

Section 1: To be completed by the employee. The employee must sign, certifying that the dependent student meets the eligibility requirement in IRS section 152 and that if asked the employee will provide evidence of such.

The form should then be given to Human Resources to Certify Eligibility. Form may be delivered to the HR Building, emailed to benefits@uidaho.edu, or faxed to 885-3330. After Human Resources certifies eligibility, the signed form will be returned to the employee.

Section 2: To be completed by Student Financial Aid Services if the dependent student has financial aid awards and needs more information to make a decision about choosing between the institutional financial aid awards they have been offered and the Employee Dependent Tuition Waiver.

The form may be delivered to Student Financial Aid Services in SUB 101 (a drop box is located on the wall outside the office for after-hours delivery), emailed to finaid@uidaho.edu, or faxed to 208-885-5592. Forms delivered to the Financial Aid Office will be available for pick-up 24 hours after they are dropped off during regular business days.

Section 3: To be completed by the dependent student if they elect to use the Employee Dependent Tuition Waiver and they understand/agree with the all of the statements listed in Section 3.

To receive the Employee Dependent Tuition Waiver benefit, the application must be delivered to the Student Accounts office with sections 1 and 3 completed. Section 2 is optional with information provided upon request to assist in making a decision.

Section 4: After ensuring that all required sections have been filled out and signed, please submit the Employee Tuition Waiver Application at Student Accounts at Room 125 at the Student Union Building. Waivers will be posted within two business days of receipt at Student Accounts.

Phone 208.885.7447
Fax 208.885.9209
875 Perimeter Dr MS 4250
Moscow, ID 83843-4250
EMPLOYEE DEPENDENT
TUITION FEE WAIVER APPLICATION

Under the Employee Dependent Education Tuition & Fee Waiver Program (FSH 3780), enrollment in the University for reduced fees (50% reduction of in-state tuition and fees) is extended to the dependents (as defined by the Federal Income tax code, Sect. 152) of board-appointed UI employees on regular appointment who work at least half-time, including those on official leave. The Employee Dependent Tuition & Fee Waiver Program is a qualified tuition reduction plan under Sect. 117 of the Internal Revenue Code. Under this program, fees waived for enrollment in undergraduate courses are exempt from federal, state and social security taxes. Provisions of federal or state law may, however, change at any time. Please consult your personal tax advisor for implications to your individual situation.

SECTION 1: TO BE REVIEWED AND SIGNED BY EMPLOYEE:

If an employee's appointment is terminated during a semester for which the employee’s dependent is registered for academic work under this policy, the Employee Dependent Tuition & Fee Waiver is cancelled. As with all students who enroll in the university, the student is responsible for the remaining balance after waiver cancellation.

By applying for this waiver, I, __________________________ print employee name ________________ , a board-appointed employee of the University, verify that my dependent and I meet the requirements outlined above. The dependent student, __________________________ print student name ________________, meets the eligibility requirements in IRS section 152. If asked by the university, I will provide certain evidence (e.g., federal tax return) to support verification of eligibility. I acknowledge that fraudulent certification of dependent eligibility by an employee may be grounds for discharge, and I would be required to repay all costs associated with this benefit.

Date __________________________

Employee Signature __________________________ Employee ID V________________________

Department Employed by __________________________ Title/Position __________________________

LIMITATIONS:

- Student must be degree-seeking.
- Waiver applies only to in-state tuition.
- Waiver only applies to Fall and Spring semesters.
- Waiver can only be used by each student for a maximum of eight semesters.
- Only one dependent per household at a time may use the waiver.
- Student must meet dependent eligibility requirements set forth in current IRS Federal Income Tax Code (Title 26 – Section 152). Please see the following link for IRS code dependent definitions on this matter (http://www.law.cornell.edu/uscode/text/26/152)
- Student must re-apply each term.

TO BE COMPLETED BY HUMAN RESOURCES: CERTIFICATION OF ELIGIBILITY

__________________________________________ Human Resources Signature __________________________

Date __________________________

Term/Year __________________________
SECTION 2: TO BE COMPLETED BY THE FINANCIAL AID OFFICE TO ASSIST IN YOUR DECISION:

Term:______________

Dollar value of Institutionally Funded Financial Aid offered to Student:________________________

Dollar Value of Employee Dependent Tuition Waiver: _____________________________

Signature of Financial Aid ___________________________ Date:________________

SECTION 3: TO BE REVIEWED AND SIGNED BY DEPENDENT STUDENT:

I understand that institutional scholarship funds cannot be taken at the same time as the Employee Dependent Tuition waiver, and have all of the information that I need to make my decision below.

For the semester of ____________________, I am choosing to use:
(Pick only one)

☐ Keep institutionally funded financial aid and decline waiver.

☐ Use Employee Dependent Tuition Waiver: I authorize Student Financial Aid to cancel all my institutionally funded scholarships.

By applying for this waiver:
- I acknowledge that I am responsible for all fees if the waiver should be cancelled (i.e., if the employee separates from the university.)
- I can use this waiver for a maximum of eight semesters, and only for Fall or Spring terms.
- I have read and understood the rules & limitations on both sides of this form.
- I understand if I select the Employee Dependent Tuition Waiver, all institutionally funded financial aid will be cancelled.

Date________________

Dependent Name __________________________________ Relationship to Employee ____________________

Dependent Signature __________________________ Student ID Number _____________________________

After completion by Human Resources and Financial Aid, this form must be returned to: Student Accounts/Cashiers, 875 Perimeter Drive MS 4250, Moscow, Idaho 83844-4250 (SUB Room 125). Fax: 208-885-9209

SECTION 4: TO BE COMPLETED BY STUDENT ACCOUNTS:

Semesters waived: 201210 201220 201310 201320 201410 201420 201510 201520 201610 201620 201710 201720 201810 201820 201910 201920 202010 202020

Matriculated? Y N

Total credits at time waiver posted: ___________ Amount waived: ____________________________

Date Initials Comments: ________________________________

Form received ___________ ____________
Waiver Posted ___________ ____________
Fin Aid Notified ___________ ____________

Rev. 7/24/12