MEETING #3 OF THE FACULTY OF THE UNIVERSITY OF IDAHO

Tuesday, May 5, 2015 - 3:00-4:30 p.m. (PT), Bruce M. Pitman Center International Ballroom
Boise – IWC 348; Coeur d'Alene – 241; Idaho Falls – IF7 (TAB320); Twin Falls – B-66
President Chuck Staben Presiding

- Call to Order.
- In Memoriam.
- Minutes. Meeting #2, January 15, 2015
- Announcements.
- Special Orders.

Report of the Faculty Senate
[Below items are available: http://www.webs.uidaho.edu/facultycouncil/General_Faculty_Meetings/univ_faculty_meetings.htm]

I. Proposed Changes/Additions to Faculty-Staff Handbook (FSH)/Administrative Procedures Manual (APM)

Classification System:
- FS-15-062: FSH 3360 – Probation, Promotion, Demotion, Reassignment and Transfer of Non-Faculty Exempt and Classified Employees

Promotion & Tenure:
- FS-15-064: FSH 3560 – Promotion form

Employee Benefits:
- FS-15-051: FSH 3710 – Leave Policies for All Employees
  - FS-15-052: APM 55.07 – Shared Leave (FYI)
  - FS-15-053: APM 55.09 – Employee Leave Benefits (FYI)
- FS-15-060: FSH 3780 – Dependent Tuition
- FS-15-067: FSH 3730 – Retirement Privileges & Programs

Other:
- FS-15-024: FSH 2700 – Student Evaluations
- FS-15-056: FSH 1620 B-2 – University Level Committees
- FS-15-045: FSH 1640.36 – Dismissal Hearings Committee/FSH 1640.43-Faculty Appeals Hearing Board (FYI)
- FS-15-069: FSH 3840 – Procedures for Faculty Appeals
- FS-15-070: FSH 3910 – Dismissal and Discipline of Faculty

Miscellaneous (FYI):
- FS-15-042: FSH 1640.95 – University Security and Compliance Committee
- FS-15-043: FSH 1640.89 – University for General Education
- FS-15-044: FSH 1640.90 – General Education Assessment Committee
- FS-15-068: FSH 1640.20 – University Budget & Finance Committee
- FS-15-054: APM 70.23 – University International Travel
- FS-15-055: APM 5.05 – Travel Liability, Insurance and Evacuation Assistance for International Travel
- FS-15-057: APM 45.35 – UI Unmanned Aircraft Systems (UAS)
- FS-15-058: APM 95.35 – Personal Use of Unmanned Aircraft Systems (UAS)
- FS-15-059: APM 35.35 – Public Use & Liabilities
II. Proposed Changes to the University of Idaho Catalog

- **FS-15-049** (UCC-15-071): Graduate Student GPA Requirement for Graduation
- **FS-15-065** (UCC-15-080): College of Graduate Studies Undergraduate Enrollment and Courses for Graduate Transcripts

- President’s Remarks.

- Adjournment.

  Don Crowley, Secretary of the Faculty, (885-6151)

**NOTE:** 97 faculty members (all campuses state-wide) constitute a quorum. Quorum and voting regulations can be viewed at FSH 1520 Article III with the goal to actively include off-campus faculty participation in faculty meeting. To determine your voting right as a faculty member please see FSH 1520 Article II Section I. Those who are recognized by the President for the purpose of speaking should identify themselves by name and discipline or position.

**NOTICE:** Off campus faculty will be receiving a separate email with a URL to access the meeting live. Also available at this site will be a streaming video link that can be viewed after the meeting for those unable to attend.
Call to Order: The meeting was called to order at 3:06 pm (Pacific)

In Memoriam: President Staben asked for a moment of silence to honor the victims of last Saturday’s shootings in Moscow.

Faculty Senate Chair Marty Ytreberg asked for a count to determine a quorum. It was determined that there were 142 faculty present. (Moscow 109, Boise 14, CDA 4, Idaho Falls 9, Twin Falls 6). This does constitute a quorum.

Announcements: The President recognized Karen Launchbaugh from the College of Natural Resources. Professor Launchbaugh received an award as 2014 U.S. Professor of the Year from Idaho given by the Carnegie Foundation for the Advancement of Teaching and the Council for Advancement and Support of Education (CASE).

Special orders: Chair Ytreberg asked if there were any corrections or additions to the minutes from UFM #1 from September 2, 2014. Hearing none, it was moved and seconded to accept the minutes. The motion passed with no objections.

I. Proposed Changes/Additions to Faculty Staff Handbook

Academic Freedom—Faculty Governance:

- FS-15 009: FSH 1520—University Constitution. This proposal adds the following new language “Faculty are entitled to speak or write freely on matters pertaining to university governance, programs and policies” to 1520-Article I-section 4. This addition is intended to protect the ability of faculty to speak to all matters of university governance. The provision passed 141-0-1.

Faculty Senate Terms:

- FS-15-001: FSH 1520—University Constitution. Changes the language in 1520-Article V-section 4 to allow a Senator to serve two consecutive terms. One of the justifications for the change is that it would allow a person in their final year of their first term to run again and if elected be a candidate for Chair or Vice Chair. The current situation artificially limits those who might wish to serve as a Chair or Vice Chair. This proposal passed 141-1.

- FS-15-002: FSH 1580—Bylaws of the Faculty Senate. This provision clarifies that a Senator who completes more than half of another member’s unexpired term will be considered to have served a full term. This passed without objection.

Position Description:

- FS-15-023: FSH 3050—Position Description Form. This proposal sought to add the following language to the faculty position description. “Instructors will provide syllabi to their unit offices at the beginning of each term for courses for which they are responsible. Each syllabus should include expected learning outcomes for the course and should describe an example of how at least one
learning outcome is assessed.” The Provost Office felt language such as this was important for accreditation. A faculty member suggested that this was already being done. The Chair noted that this was true but the new language was an attempt to make this consistent and uniform across campus. This proposal passed 125-9-8.

**Compensatory Time Policies:**

- **FS-15-029: FSH 3460—Overtime Work, Compensatory Time and Holidays**
  Working with Staff Affairs this proposal seeks to address past issues with compensatory time. This proposal passed without objection.

**Other:**

- **FS-15-007: FSH 4620—Academic Calendar.** This updates the academic calendar to 2028. The motion originating from the Registrar’s Office is to accept this academic calendar as presented. A faculty member raised a concern about years in which we start before August 20th. This is a hardship on students who have summer jobs and perform internships. Also, it is increasingly difficult to create a good learning environment in classrooms that aren’t air conditioned. He suggested in the future the Senate and the Registrar should pay careful attention to modifying the early start years by running the semester later in December. The Registrar’s Office noted the partnership with WSU and the need to align our schedule with them guides this change. The proposal passed 72-44-26.

- **FS-15-031: FSH 3760 Educational Privilege.** The motivation for this change came from the Faculty Affairs Committee recognizing that colleagues not in Moscow were disadvantaged by current policy which restricted the courses that could be taken to face-to-face courses. The original proposal removed the face-to-face restriction. However, Ruth Funabiki, chair of FAC, rose to introduce a substitute motion. The substitute motion would clarify that the proposed change would only apply to UI employees by stating that “Employees at other four-year higher education institutions and state agencies under the jurisdiction of the State Board of Education are limited to courses that are offered in a traditional classroom setting.” The motion to substitute passed 137-2-3. The substituted policy change then passed without objection.

- **FS-15-032: FSH 3185 Work Related Education.** This is a new policy that relates to university directed and job specific required education. This proposal clarified the responsibility of employees to complete required work-related education and the responsibility of the supervisor to support and provide reasonable accommodation for employees to participate in work-related education. This policy change passed without objection.

- **FS-15-033: FSH 3180 Employee Professional Development and Learning.** This is an FYI identifying a minor edit to 3180 D-1.

**Miscellaneous (FYI):**

- **FS-15-010: FSH 1640.89--University Committee on General Education.** This is a change to the committee structure. The change adds the director of academic advising as a non-voting member to the committee. This was passed by the Senate but the FSH does not currently require a vote at the UFM for this type of committee change.

- **FS-15-011: FSH 1640.28-- Committee on Committees.** This is a change removing the fixed time for this committee to meet. The committee will determine its meeting time each year. The change also allows the Faculty Senate Leadership to
fill vacancies on committees over the summer. This also does not require a vote at the UFM.

II. Proposed Changes to the University of Idaho Catalog

- **FS-15-025: Regulation J-3.** This proposal makes changes to the general education requirements. There was no discussion of the changes and the motion passed 99-1-42.
- **FS-15-026: CLASS - Split Writing Minor.** The proposal splits the current writing minor into two distinct minors. A professional writing minor and a creative writing minor. There was no discussion and the proposal passed 134-1-7.
- **FS-15-027: CLASS - Rename Professional Emphasis in English.** The proposal changes the name from Professional Emphasis to Professional Writing Emphasis. This passed without objection.
- **FS-15-028: CLASS - Add new emphasis for History BA.** This passed without discussion 130-2-10.
- **FS-15-034: Science - Drop an Option in Math.** This proposal would drop the Applied Operations Research Option. This passed without discussion 134-1-7.
- **FS-15-035: CLASS - Add Organization Dynamic Certificate.** This passed 123-3-16.

Chair Ytreberg thanked everyone for coming out to vote and turned the meeting back to President Staben.

**President’s Remarks.** President Staben announced that after today’s meeting is over we would be dedicating and renaming the SUB as the Pitman Center. He encouraged everyone to join him downstairs for this dedication in honor of Bruce Pitman.

The President noted that he has spent a great deal of time speaking about the need to increase undergraduate enrollment. While this is one of our primary missions and the key to our financial future, he would like to remind everyone that we are more than an undergraduate institution. We are Idaho’s research and land-grant university. We have a number of important missions and we should have a shared understanding that along with undergraduate education our graduate education, research, and outreach missions are important to the state.

This being the legislative season President Staben provided some comments on developments in Boise. The Governor’s proposed budget included a 3% increase in employee compensation. President Staben believes that 3% is what we should anticipate and he has had some conversations with UBFC about how this can be administered. While the Governor’s budget proposes an increase in funding of 7.4% in K-12 education, it does recognize the importance of investing in higher education. The Governor recommended that each of the higher education institution’s priorities be funded. In our case that was an increase in funding for the Agricultural Research Experiment Station. Our other priorities included the Complete College Initiative and a Career Development initiative. The President finds it encouraging that the Governor based his priorities on our priorities.

On January 24th we will be celebrating the end of our Inspiring Futures Campaign. Our goal was $225 million but should close just above $260 million. This is encouraging
because these funds will allow us to provide scholarships, build some facilities, and enhance programs. The funding campaign was a vote of confidence from around 50,000 donors and recognition of the excellence of the University.

We have been working hard on enrollment. President Staben thanked the people in enrollment management who have had a stressful year of significant change. Some of the changes include simplifying and enhancing our scholarship programs. We have also made some changes to Vandal Envision including having a Saturday event instead of the Friday event which placed a burden on families trying to come to campus. While we might not see enrollment gains as rapidly as we would like he guarantee’s that we will work hard to increase enrollment. In everything that we do we can strive to do better.

The president then opened up the floor to questions.

- **What steps are being taken to enhance distance education?** The President responded that we hired a new coordinator for distance education. He agrees that distance education offers an opportunity for the University.

- **Can you speak to the quality of education and concerns that have been raised about how increasing enrollment places stress on the quality of courses?** The President did not think there was a direct correlation between increasing enrollment and quality of education. Maintaining quality will be challenging but we can employ technology and different pedagogical methods. We will not be able to increase faculty at the same rate as enrollment growth. We will have to work together and faculty will have to figure out how to ensure quality.

- **What is the status of ongoing searches?** The President noted that we have hired Jean Kim as our new Vice Provost for Student Affairs and Enrollment Management. The Provost search had a strong pool and we will be conducting airport interviews at the end of January. After these interviews the finalists will be brought to campus. The search for Vice President for Advancement is being led by Ron Smith and is underway. Dan Ewart is leading the search for Executive Director for Communication and Marketing and we will be looking at finalists fairly soon. President Staben encouraged faculty to participate in these important searches.

- **Are there plans on how we might upgrade existing facilities?** President Staben noted the new buildings for the College of Education and IRIC. He has set aside funds for classroom renovations and there is a committee to identify the most pressing needs. We have received some funds for deferred maintenance. He was surprised at the small amount of funds dedicated to buildings in the Inspiring Futures Campaign.

- **What is your position and can you provide an update on the initiative to declare the University a “tobacco free campus”?** President Staben stated that there was significant support for a “tobacco free” campus. He plans to appoint a committee to develop policy and to ensure that all the voices that want to be heard on this issue are heard.

With no more questions being asked a motion to adjourn passed unanimously at 4:20.

Respectfully submitted,
Don Crowley, Faculty Secretary and Secretary to Faculty Senate
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

Facility/Staff Handbook [FSH] □ Addition ✔ Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title: FSH 3360 – Probation, Promotion, Demotion - new
classification system

Administrative Procedures Manual [APM] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title:
All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to
apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all
changes must be made using “track changes.”

Originator(s): Staff & Senate Leadership 2015
(Please see FSH 1460 C)

Telephone & Email: crowley@uidaho.edu, 885-6151

Policy Sponsor: (If different than originator.)

Telephone & Email:

Reviewed by General Counsel __Yes ___No _____________________

I. Policy/Procedure Statement: Briefly explain the purpose/raison of proposed
addition, revision, and/or deletion to the Faculty/Staff Handbook or the
Administrative Procedures Manual.

The purpose of this change is to ensure consistency between the Faculty-Staff
Handbook (FSH) and Administrative Procedures Manual (APM) and move policy
that is in APM 50.51 into the appropriate policy in FSH 3360.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion
have?
None.

III. Related Policies/Procedures: Describe other policies or procedures existing that are
related or similar to this proposed change.

Future review will be necessary, and has already been in review by staff, HR, and
Counsel for the following: APM 50.50, 50.51, 50.35, 50.55; FSH 3360, 3370, 3440,
3460, 3080, perhaps others.

IV. Effective Date: This policy shall be effective immediately upon final
approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ____________________________

Policy Coordinator
Appr. & Date: ____________________________
[Office Use Only]

FSH
Appr. ____________
FC ______________
GFM ____________
Pres./Prov. ____________
[Office Use Only]

APM
F&A Appr.: ____________________________
[Office Use Only]

Track #: ____________________________
Date Rec.: ____________________________
Posted: t-sheet ____________
h/c ____________
web ____________
Register: ____________________________
(Office Use Only)
UI FACULTY-STAFF HANDBOOK
CHAPTER THREE:
EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF

PROBATION, PROMOTION, DEMOTION, RECLASSIFICATION AND
TRANSFER OF CLASSIFIED EMPLOYEES

PREAMBLE: An original part of the 1979 Handbook, this section underwent a full revision in 2003 to bring it in line with Regents policy. In 2009 a definitions section was added, APM 50.15 was incorporated into this policy and various minor edits were made. For further information, contact Human Resources (208-885-3638). [ed 7-97, 7-03, rev. 7-09]

CONTENTS:
A. Definitions
B. Probation
C. Promotion
D. Demotion
E. Transfer

A. DEFINITIONS.

A-1. Certified Status. In this section and related policy statements, reference to “certified status” means that the employee has successfully completed the probationary period.

A-2. Demotion. Reassignment of an employee from his or her present position to one that is in a lower pay grade and in which the employee has previously held certified status or for which he or she has the minimum qualifications.

A-3. Probation. A working test period to provide unit administrators with an opportunity to evaluate a person’s work performance and suitability for the position. The probationary period for classified employees beginning a new position is six months.

A-4. Promotion. A career opportunity that involves greater responsibilities, and may also involve an increase in salary and a change in title. Promotions are not intended to be used where duties are changed on a temporary basis. A promotion is distinct from a reclassification in that it moves the employee into a different position, retaining little, if any, of the responsibilities of his or her previous position, as long as the employee meets the minimum qualifications of the position.

A-5. Reclassification. An employee retains the majority of his/her original responsibilities while accepting duties requiring a higher level of knowledge, skills or abilities.

A-6. Transfer. An opportunity for an employee to move into a different unit at the university with the same classification and title.

B. PROBATION.

B-1. Each employee, following initial appointment or promotion to a classified position, must successfully complete a probationary period of at least six full months. The probationary period in a given class must be completed within a single unit and not be interrupted by resignation or dismissal. An employee who has been separated during the probationary period, other than by “layoff” [see 3930 B], must begin a new probationary period upon being rehired or promoted to that class. [ed. 7-03, 7-09]
UI FACULTY-STAFF HANDBOOK
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF
Section 3360: Probation, Promotion, Demotion, and Transfer of Classified Employees

B-2. The unit administrator is encouraged to complete an employee performance development plan available on the Human Resource Development website at www.hr.uidaho.edu/hrd, and a 3-month and 6-month evaluation using the “Staff Personnel Evaluation” form [see 3340] available on the HR website at http://www.uidaho.edu/humanresources.aspx. The 6-month evaluation must be completed, discussed with the probationary employee, and reviewed by the second-level supervisor before the probationary period ends. A probationary employee may be dismissed or returned to his or her former classification, without cause being assigned, upon the recommendation of the unit administrator at any time before the completion of the probationary period with prior approval of the executive director for human resources or designee. Normally, a probationary employee whose appointment is to be terminated will be given two weeks' notice. Dismissal under these circumstances is not a basis for recourse to the grievance procedures described in 3860. [rev. 7-02, 7-03, 7-09]

C. PROMOTION.

C-1. An employee may be considered for promotion on the basis of his or her past record, length of service, performance in the present position, and qualification to perform the duties of the higher position. [See also 3380D.] [ren. 7-09]

C-2. A supervisor may promote an employee into a vacant position in the unit if the employee has demonstrated exceptional competency and skill for that position. [rev. & ren. 7-09]

C-3. A promotion may occur in a unit that is undergoing reorganization. In this case, an explanation of the office or unit changes and the reasons why the employee is qualified for the promotion is necessary. [rev. & ren. 7-09]

C-4. If the employee is promoted into a classification for which he or she is not certified, a 6-month probationary period is required (see FSH 3360, B-1). [rev. 7-03, ed. 7-09]

C-5. When there is more than one internal candidate who meets the minimum qualifications for the position within the unit, the hiring administrator must, at a minimum, conduct a UI-only search to document the candidate’s qualifications and identify the most qualified individual. The hiring administrator must send an email to the Director of Human Rights, Access and Inclusion as hrai@uidaho.edu requesting a UI-only search stating that there is one promotional opportunity and more than one qualified internal candidate. [add. 7-03, rev. 7-09]

C-6. Process. The Director of Human Rights, Access and Inclusion is the approving authority for all promotions of classified employees. [add. 7-03, ed. 7-09]

a. To promote an employee, the unit follows all affirmative action and equal employment opportunity policies by posting the position in the Applicant Tracking System (ATS) and evaluating the applicants. The employee applies for the position using the ATS. See APM 50.02. [add. 7-09]

b. Exceptions to posting internal promotional opportunities require the review and approval of the Director of Human Rights, Access and Inclusion. The unit administrator must e-mail the Director of Human Rights, Access and Inclusion at hrai@uidaho.edu to request an internal promotion, stating the justification for waiver of a search. The unit must provide. [add. 7-09]
UI FACULTY-STAFF HANDBOOK

Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF

Section 3360: Probation, Promotion, Demotion, and Transfer of Classified Employees

1) A current Results Oriented Job Description (ROJD), reviewed and approved by the classification and compensation analyst in Human Resources;
2) A resume from the promotion candidate;
3) The plans for the "to be vacant" position;
4) A salary recommendation (optional).

C-6. The unit must complete a standard Position Authorization Form, which must then be processed through regular approval channels. This includes any processes unique to the unit. [add. 7-09]

C-7. The Director of Human Rights, Access and Inclusion or designee will review and provide a written response to the request for promotion. The unit CANNOT offer the position until it receives approval from the Director of Human Rights, Access and Inclusion. For additional information call (208) 885-4285. [add. 7-09]

D. RECLASSIFICATION (see APM 50.51)

D-1. The classification of a position determines the pay grade to which it is assigned and is only for classified and exempt staff. Classification decisions are not based on an employee's job performance. They are based on identifying and analyzing the established job value factors within the current job and comparing those job value factors to other positions in the same and higher (or lower) classifications. All classification reviews are performed in Employment Services in Human Resources (HR) see APM 50.51. Reclassification decisions may be appealed (see APM 50.51 C-2 and FSH 1640.24).

D-2. Reasons for a reclassification may include: a significant change in job responsibilities and tasks, and may require higher level or lesser level knowledge, skills and abilities. Reclassifications may result in a position moving to a higher or lower pay grade.

D-3. New duties assigned to the position must be permanent and if an incumbent exists, be performed currently. The reclassification request may be made at any time after these two criteria are met. The division or unit submitting a request for reclassification provides the funds for any necessary salary increase resulting from the review. If a reclassification and pay change are warranted, the effective date of the pay change will be the date the complete reclassification package was submitted to Human Resources.

D-4. A reclassification request for a position with an incumbent may be made no sooner than nine (9) months after the incumbent’s hire date into that position.

D-5. Job value factors will be clearly defined with criteria that clearly support and explain the process used to determine reclassification decisions (also see APM 50.51).

DE. DEMOTION (see also APM 50.21).

[ed. 7-02]

ED-1. An employee may be demoted, subject to the approval of the unit administrator and the executive director for human resources or designee. The unit administrator may recommend the demotion of an employee for any of the following reasons. [ed. 7-02, ren. & ed. 7-09]
Section 3360: Probation, Promotion, Demotion, and Transfer of Classified Employees

a. The reallocation or reclassification of a class or position to a lower pay grade.

b. The elimination of the employee's position because of lack of work or lack of funds.

c. Expiration of a temporary promotional assignment. [add. 7-03]

d. The failure of the employee to complete successfully the probationary requirements of a higher position.

e. Disciplinary action for causes stated in 3930 C-1 but not of a degree of severity that would warrant suspension or dismissal.

f. At the request of the employee. [rev. 7-02]

DEF-3. Procedure. A unit administrator's recommendation that an employee be demoted is submitted through the dean or equivalent administrator. Concurrently, written notice is given to the employee and to the executive director for human resources or designee. An employee with certified status must be given notice of demotion at least 15 calendar days before its effective date and must be given the reasons for the demotion. [ed. 7-03, ren. & ed. 7-09]

DEF-4. Effect of Demotion on Salary. When an employee is demoted, his or her salary is reduced to a step in the lower pay grade as recommended by the unit administrator and the executive director for human resources or designee. If demotion is due to failure to successfully complete the probationary requirements of the higher position to which he or she had been provisionally promoted, the salary after demotion will normally coincide with the salary the employee was receiving before promotion. [ed. 7-02, ren. & ed. 7-09]

EF. TRANSFER.

EF-1. An employee may voluntarily transfer from one unit to another in the exact same title and pay grade. An employee who wishes to be transferred should make a written request to his or her unit administrator and Employment Services. UI may involuntarily transfer an employee as long as there is no loss of compensation. [rev. 7-02, 7-03, rev. & ren. 7-09]

EF-2. An employee requesting transfer between units must complete application materials through Employment Services in HR before a transfer request will be considered. [rev. 7-03, ren. & ed. 7-09]

EF-3. An employee-requested transfer between units also requires the written approval of the unit administrators concerned, the employee, and the director of employment services. [add. 7-03, ren. & ed. 7-09]

EF-4. A transfer is made without reduction in hourly wage unless such reduction is agreed to by the employee and the unit administrator. [ed. 7-02, ren. 7-03, ren. & ed. 7-09]

EF-5. The transfer of an employee does not affect his or her prior earned credited state service. However, the transfer may affect the employee's leave accrual rate, which is based on years of service, hours worked, and percentage of appointment. [rev. 7-02, 7-03, ren. 7-03, 7-09]
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH] □ Addition ■ Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title: FSH 3520 Report and Recommendation for Awarding of Tenure

Administrative Procedures Manual [APM] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title: FSH 3520 Report and Recommendation for Awarding of Tenure

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.
*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Provost’s Office – Mary Stout January 29, 2015
(See FSH 1460 C)
Telephone & Email: 885-6444 stoutm@uidaho.edu

Policy Sponsor: Paul McDaniel April 13, 2015
(If different than originator.)
Telephone & Email: 885-7012 paulm@uidaho.edu

Reviewed by General Counsel X Yes ___ No Name & Date: April 20, 2015

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.
Formatting and minor editorial changes clarify and simplify tenure recommendation form. Signature line for Provost has been added to be consistent with policy as described in FSH 3520 I.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?
None

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: _______________________

Policy Coordinator
Appr. & Date: [Office Use Only]

FSH
Appr. ____________
FC ____________
GFM ____________
Pres./Prov. ____________
[Office Use Only]

Track # ____________
Date Rec.: ____________
Posted: t-sheet h/c ____________
web ____________
Register: ____________
(Office Use Only)

APM
F&A Appr.: ____________
[Office Use Only]

University Faculty Meeting #3 - 2014-15 - May 5, 2015 - Page 12
Candidate’s Name ____________________________________________________________

Current Rank ___________________________ Unit ________________________________

VERIFICATION OF ELIGIBILITY FOR TENURE

Criteria of eligibility for tenure are met as follows:

_______ Candidate holds a tenure-track position and a tenurable rank [see section 3520 D of the Faculty-Staff Handbook].

_______ Candidate has served one full year, or more, at UI in the rank of senior instructor or above.

Candidate has completed ____ full years of probationary service at UI (not more than two years in rank of instructor at UI may be counted) by:

serving ____ full years in the rank of ____________________ from ______________ to _____________,

serving ____ full years in the rank of ____________________ from ______________ to _____________,

serving ____ full years in the rank of ____________________ from ______________ to ______________;

[not more than two years in rank of instructor at UI may be counted];

and by being credited with not more than four years of equivalent service:

for ____ full years in the rank of ____________________ (rank) at ____________________, (institution) and

for ____ full years in the rank of ____________________ (rank) at _____________________.

We concur in the foregoing statements:

__________________________________   ___________________________________
(Candidate)     (Unit Administrator)

REQUIRED ELEMENTS OF EVALUATION

Concurring with the foregoing statements and having reviewed the documents referenced in G-5-c, we concur in their completeness and accuracy. Other documentary material deemed by either of us to be pertinent has been appended to the curriculum vitae. [rev. 1-10, ed. 11-11]

__________________________________ ___________________________________
(Candidate)   (Unit Administrator)

Copies of the documents referenced in G-5 c were made available to the persons or groups called upon to participate in the evaluation of the candidate and to make recommendations on the awarding of tenure. [rev. 1-10, ed. 11-11]

__________________________________
Candidate Signature

__________________________________
Unit Administrator Signature

__________________________________
Unit Administrator Signature (for faculty with J/joint Appointment)

__________________________________
Interdisciplinary/Center Administrator Signature (when appropriate)

__________________________________
Interdisciplinary/Center Administrator Signature (when appropriate)

(Recommendations continue on next page of form)
RECOMMENDATION ON AWARDING OF TENURES

Each reviewing person or group enters its recommendation below. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations shall be appended. [rev. 1-10, ed. 11-11]

The unit tenure-recommending committee ____ does ____ does not recommend that tenure be granted awarded:
there were ____ votes in favor of and ____ votes against recommending that tenure be granted awarded, and there were ____ abstentions. [ed. 1-10]

______________________________________________
(Unit Committee Chair Signature (or N/A if no committee)

There are ____ tenured faculty members of the unit of the candidate, and ____ of these faculty submitted a recommendation on the award of tenure. do ____ do not recommend that tenure be granted. There were ____ votes in favor of and ____ votes against recommending that tenure be granted, and there were ____ abstentions.

_______________________________________________________
(Unit Administrator) Signature or person responsible for faculty vote

I ____ do ____ do not recommend that tenure be granted awarded.

_________________________________________
(Unit Administrator Signature)

The college committee on tenure ____ does ____ does not recommend that tenure be granted awarded.

_________________________________________
(College Committee Chair Signature)

I ____ do ____ do not recommend that tenure be granted awarded.

__________________________________________
(Dean Signature)

I ____ do ____ do not recommend that tenure be granted awarded.

__________________________________________
Provost and Executive Vice President Signature

I ____ do ____ do not approve the award of tenure.

__________________________________________
(President Signature)
FSH 3520 - REPORT OF EVALUATION AND RECOMMENDATION
FOR AWARDING OF TENURE
[rev. 2015]

Date ___________________________

Candidate’s Name ______________________________________________________________________________

Current Rank ___________________________ Unit ___________________________

VERIFICATION OF ELIGIBILITY FOR TENURE

________ Candidate holds a tenure-track position and a tenurable rank [see section 3520 D of the Faculty-Staff Handbook].

________ Candidate has served one full year, or more, at UI in the rank of senior instructor or above.

Candidate has completed ____ full years of probationary service at UI (not more than two years in rank of instructor at UI may be counted) by:

serving ____ full years in the rank of ____________________ from ______________ to ______________, and

serving ____ full years in the rank of ____________________ from ______________ to ______________, and

serving ____ full years in the rank of ____________________ from ______________ to ______________;

and by being credited with not more than four years of equivalent service:

for ____ full years in the rank of ____________________ at ______________________________, and

for ____ full years in the rank of ____________________ at ______________________________.

====================================================

REQUIRED ELEMENTS OF EVALUATION

Concurring with the foregoing statements and having reviewed the documents referenced in G-5-c, we concur in their completeness and accuracy. Other documentary material deemed to be pertinent has been appended to the curriculum vitae.

Copies of the documents referenced in G-5 c were made available to the persons or groups called upon to participate in the evaluation of the candidate and to make recommendations on the awarding of tenure.

________________________________________ _________________________________________________

Candidate Signature Unit Administrator Signature

_________________________________________________

Unit Administrator Signature (for faculty w/joint appointment)

_________________________________________________

Interdisciplinary/Center Administrator Signature (when appropriate)

_________________________________________________

Interdisciplinary/Center Administrator Signature (when appropriate)

(Recommendations continue on next page of form)
RECOMMENDATION ON AWARDING OF TENURE

Each reviewing person or group enters its recommendation below. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations shall be appended.

The unit tenure-recommending committee ____ does ____ does not recommend that tenure be awarded: there were _____ votes in favor of and _____ votes against recommending that tenure be awarded, and there were _____ abstentions.

______________________________________________
Unit Committee Chair Signature (or N/A if no committee)

There are ____ tenured faculty members in the unit of the candidate, and ____ of these faculty submitted a recommendation on the award of tenure. There were ____ votes in favor of and ____ votes against recommending that tenure be awarded.

_______________________________________________________
Unit Administrator Signature or person responsible for faculty vote

I ____ do ____ do not recommend that tenure be awarded.

_________________________________________
Unit Administrator Signature

The college committee on tenure ____ does ____ does not recommend that tenure be awarded.

_________________________________________
College Committee Chair Signature

I ____ do ____ do not recommend that tenure be awarded.

__________________________________________
Dean Signature

I ____ do ____ do not recommend that tenure be awarded.

__________________________________________
Provost and Executive Vice President Signature

I ____ do ____ do not approve the award of tenure.

__________________________________________
President Signature
**POLICY COVER SHEET**

*(See Faculty Staff Handbook 1460 for instructions at UI policy website: [www.webs.uidaho.edu/uipolicy](http://www.webs.uidaho.edu/uipolicy)*

[3/09]

| Faculty/Staff Handbook [FSH] | Addition | Revision* | Deletion* | Emergency | Minor Amendment | |
|-----------------------------|----------|-----------|-----------|-----------|-----------------| |
| Chapter & Title: FSH 3560 Report of Evaluation and Recommendation for Promotion in Faculty Rank | |
| Chapter & Title: | |

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

---

**Originator(s):**

(See FSH 1460 C)

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provost’s Office – Mary Stout</td>
<td>January 29, 2015</td>
</tr>
<tr>
<td>Telephone &amp; Email:</td>
<td></td>
</tr>
<tr>
<td>885-6444</td>
<td><a href="mailto:stoutm@uidaho.edu">stoutm@uidaho.edu</a></td>
</tr>
</tbody>
</table>

**Policy Sponsor:**

(If different than originator.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul McDaniel</td>
<td>April 13, 2015</td>
</tr>
<tr>
<td>Telephone &amp; Email:</td>
<td></td>
</tr>
<tr>
<td>885-7012</td>
<td><a href="mailto:paulm@uidaho.edu">paulm@uidaho.edu</a></td>
</tr>
</tbody>
</table>

**Reviewed by General Counsel:**

X Yes ___ No  Name & Date: April 20, 2015

---

I. **Policy/Procedure Statement:**

Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

*Formatting and minor editorial changes clarify and simplify promotion evaluation and recommendation form. A separate ballot page has been created; option to abstain from making an evaluation or recommendation has been removed.*

II. **Fiscal Impact:**

What fiscal impact, if any, will this addition, revision, or deletion have?

None

III. **Related Policies/Procedures:**

Describe other policies or procedures existing that are related or similar to this proposed change.

IV. **Effective Date:**

This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ____________________________

---

Policy Coordinator

Appr. & Date: ____________________________

[Office Use Only]

FSH  

| Appr. | FC | GFM | Pres./Prov. | |
|-------|----|-----|-------------| |
|       |    |     |             | |

[Office Use Only]

APM

F&A Appr.: ____________________________

[Office Use Only]

Track # ____________________________

Date Rec.: ____________________________

Posted: t-sheet ____________

h/c ____________

web ____________

Register: ____________________________

[Office Use Only]
Each reviewing individual enters his/her evaluation and recommendation below. Reviewing faculty members must have a rank higher than the candidate. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations should be appended. [ed. 11-11]

I judge the candidate’s performance of the duties assigned in his or her position description to be:

- exceptional performance
- performance above expectations
- performance that meets expectations
- performance below expectations
- unacceptable performance

I _____ recommend promotion

_____ do not recommend promotion

_____ abstain from making a recommendation on the proposed promotion.

(Signature) (Rank) (Unit)

(Recommendations continue on back of form)
FSH 3560 - REPORT OF EVALUATION AND RECOMMENDATION
FOR PROMOTION IN FACULTY RANK
[Rev 201511-11]

Date ___________________________________
Name __________________________________ Unit ____________________________________

Considered for promotion to the rank of ___________________________________________________________
Has served in the rank of _____________________________________ since _____________________________

====================================================

REQUIRED ELEMENTS OF EVALUATION

Having reviewed the candidate’s curriculum vitae, position descriptions and annual evaluations (including all narratives) we concur in their completeness and accuracy. Other documentary material deemed by either of us to be pertinent has been appended to the curriculum vitae.

(Candidate) Signature
(Unit Administrator) Signature

Copies of the documents referenced in E-2 a. were made available to the persons or groups called upon to participate in the evaluation of the candidate and to make recommendations on his or her promotion. [ed. 11-11]

(Unit Administrator) Signature
(Unit Administrator Signature, (Faculty with joint appointments)

Interdisciplinary/Center Administrator Signature (when appropriate)

Interdisciplinary/Center Administrator Signature (when appropriate)

(Recommendations continue on next page of form)

(cut along these lines)
FSH 3560 - RECOMMENDATIONS ON PROMOTION IN FACULTY RANK

Each reviewing person or group enters its recommendation below. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations shall be appended.

Evaluations of the candidate and recommendations on the proposed promotion have been submitted by ____ faculty members having a rank higher than the candidate. Of these, ____ judged the candidate’s performance of assigned duties to be exceptional, ____ above expectations, ____ meets expectations, ____ below expectations, and ____ unacceptable. [ed. 7-10, 11-11]

Moreover, ____ recommended promotion, ____ recommended against it, and ____ abstained from making a recommendation.

The unit promotion-recommending committee ____ does ____ does not recommend that promotion be granted: there were ____ votes in favor of and ____ votes against recommending that promotion be granted, and there were ____ abstentions. [add. 11-11]

Unit Committee Chair Signature (or N/A if no committee)

There are Evaluations of the candidate and recommendations on the proposed promotion have been submitted by ____ faculty members in the unit having a rank higher than that of the candidate, and ____ of these faculty have submitted evaluations of the candidate and recommendations on the proposed promotion. Of these evaluations, ____ judged-evaluated the candidate’s performance of assigned duties to be exceptional, ____ above expectations, ____ meets expectations, ____ below expectations, and ____ unacceptable. [ed. 7-10, 11-11]

Moreover, ____ faculty members recommended promotion and ____ recommended against it, and ____ abstained from making a recommendation.

Unit Administrator Signature (or person responsible for faculty vote)

I ____ do ____ do not recommend that the candidate be promoted. [It is suggested that a narrative statement in support of the recommendation be appended.]

Unit Administrator Signature (or N/A if no unit)

The college committee on promotions ____ does ____ does not recommend the proposed promotion. The committee’s vote was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

College Committee Chair Signature

The unit administrators of this college ____ (did) or ____ (did not) meet to consider collectively all of the recommendations submitted by the units. The vote of this group was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

Dean Signature

In the university-level review committee, the votes were: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

Provost Signature

I ____ do ____ do not recommend that the candidate be promoted.

Provost and Executive Vice President Signature

I ____ do ____ do not approve the promotion. [ed. 7-10]

President Signature
BALLOT TO BE USED BY UNIT FACULTY FOR RECOMMENDATION ON PROMOTION IN RANK

Each reviewing individual enters his/her evaluation and recommendation below. Reviewing faculty members must have a rank higher than the candidate. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations should be appended.

I evaluate the candidate’s performance of the duties assigned in his or her position description to be:

_____ exceptional
_____ above expectations
_____ meets expectations
_____ below expectations
_____ unacceptable

I _____ recommend promotion
_____ do not recommend promotion

___________________________ __________________________ __________________________________
(Signature) (Rank) (Unit)
Date
Name ___________________________  Unit ___________________________
Considered for promotion to the rank of ___________________________
Has served in the rank of ___________________________ since ____________

REQUIRED ELEMENTS OF EVALUATION

Having reviewed the candidate’s curriculum vitae, position descriptions and annual evaluations (including all narratives) we concur in their completeness and accuracy. Other documentary material deemed by either of us to be pertinent has been appended to the curriculum vitae.

Candidate Signature  Unit Administrator Signature

Copies of the documents referenced in E-2 a. were made available to the persons or groups called upon to participate in the evaluation of the candidate and to make recommendations on his or her promotion.

Unit Administrator Signature

Unit Administrator Signature, (Faculty with joint appointments)

Interdisciplinary/Center Administrator Signature (when appropriate)

Interdisciplinary/Center Administrator Signature (when appropriate)

(Recommendations continue on next page of form)
FSH 3560 - RECOMMENDATIONS ON PROMOTION IN FACULTY RANK

Each reviewing person or group enters its recommendation below. If there are any considerations that support these recommendations other than those contained in the records presented to the reviewers, a brief statement of those considerations shall be appended.

The unit promotion-recommending committee ____ does ____ does not recommend that promotion be granted: there were ____ votes in favor of and ____ votes against recommending that promotion be granted, and there were ____ abstentions.

_________________________________________________
Unit Committee Chair Signature (or N/A if no committee)

There are ____ faculty members in the unit having a rank higher than that of the candidate, and ____ of these faculty have submitted evaluations of the candidate and recommendations on the proposed promotion. Of these evaluations, ____ evaluated the candidate’s performance of assigned duties to be exceptional, ____ above expectations, ____ meets expectations, ____ below expectations, and ____ unacceptable.

Moreover, ____ faculty members recommended promotion and ____ recommended against it.

_______________________________________________________
Unit Administrator Signature (or person responsible for faculty vote)

I ____ do ____ do not recommend that the candidate be promoted.

________________________________________________________
Unit Administrator Signature (or N/A if no unit)

The college committee on promotions ____ does ____ does not recommend the proposed promotion. The committee’s vote was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

________________________________________________________
College Committee Chair Signature

The unit administrators of this college ____ did or ____ did not meet to consider collectively all of the recommendations submitted by the units. The vote of this group was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

I ____ do ____ do not recommend that the candidate be promoted.

________________________________________________________
Dean Signature

In the university-level review committee, the votes were: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

I ____ do ____ do not recommend that the candidate be promoted.

________________________________________________________
Provost and Executive Vice President Signature

I ____ do ____ do not approve the promotion.

________________________________________________________
President Signature
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH] □ Addition X Revision* □ Deletion* □ Emergency Minor Amendment □

Chapter & Title: Leave Policies for All Employees 3710

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s):
(Ruth Funabiki 3/10/15)

Name Date

funabiki@uidaho.edu

Policy Sponsor: (If different than originator.)

Name Date

Telephone & Email:

funabiki@uidaho.edu

Reviewed by General Counsel ___Yes X___No Name & Date: ________________

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

When Faculty Affairs Committee members reviewed proposed changes to FSH 3710 sent from Human Resources, the members decided to focus first on leave associated with childbirth/adoption/foster care placement. In collaboration with the Faculty Secretary’s Office, the changes to 3710 gathers “parenthood” policies in one place for the sake of clarity and convenience. As a part of the review, FAC members also deleted portions of the FSH that pre-dated the federal Family Medical Leave Act and FSH policies that were duplicated elsewhere.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

Some fiscal impact to units may be seen due to the extended weeks suggested for job protected leave from 12 to 16 weeks.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

APM 55.07 and 55.09 – to be reviewed by Faculty Secretary Office.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: __________________________________________

Track # ____________ Date Rec.: __________

Posted: t-sheet ________ h/c ________ web ________

Register: ______________

(Office Use Only)

Policy Coordinator
Appr. & Date: ____________
[Office Use Only]

FSH

Appr. ____________
FC ____________
GFM ____________
Pres./Prov. ____________

[Office Use Only]

APM

F&A Appr.: ____________
[Office Use Only]
PREAMBLE: This section describes the various kinds of leaves that are available for all UI employees. (See section 3720 for Sabbatical Leaves limited to faculty members.) This section and the following one were original parts of the 1979 Handbook. The most substantive changes since that time have been the addition (under Governor Andrus) and subsequent deletion (under Governor Batt) of service leave for children at school and changes to subsection L that reflect changes in federal regulations. In 2002 extensive changes were made to subsection K that reflected Regent policy and current practice. In 2008 extensive changes to this policy were approved following many years of committee work involving Faculty and Staff Affairs, General Counsel, and Human Resources and a new section M was added on servicemember family leave due to a federal law change. In July 2010 a section R was added to address the Fiscal Year 2010 Furlough and in July 2011 section R was removed and a new policy, FSH 3450, was created to address employment actions such as temporary furloughs. Unless explicitly noted, the text is as of July 1996. Further information is available from Human Resources (208-885-3609). [ed. 7-97, 7-05, rev. 7-98, 7-02, 2-08, 7-10, 7-11]

CONTENTS:
A. General
B. Annual Leave
C. Sick Leave
D. Holidays
E. Parenting Leave
F. Military Leave
G. Leave for Court Required Service and Voting
H. Leave for Campaigning for or Service in Public Office
I. Administrative Leave
J. Academic Transitional Leave
K. Terminal Leave
L. Shared Leave
M. Family Medical Leave
N. Servicemember Family and Medical Leave [add. 2-08]
O. Personal Leave
P. Extended Family Medical Leave
Q. Leave for Professional Improvement
R. Exceptions

A. GENERAL.

A-1. The university (hereinafter referred to as university) strives to offer leave programs that are both comprehensive and flexible to meet employee needs. Leave with or without pay is extended to employees under a variety of circumstances described below. Exceptions may be granted in special circumstances [QR; APM 55.09, 55.07, 55.38; FSH 3120, 3720 and 6230] [ed. 2-08, 7-10]

A-2. The term “leave” refers to an employee’s absence from duty. Each leave type as contained in this policy discusses circumstances in which such an absence may be continued with pay when leave accruals are available or when leave is approved without pay. Certain types of leave may require or provide options to take one leave concurrent with another. For example, sick and annual leave may be taken or may be required to be taken concurrently with other types of leave. All leaves are subject to approval.

A-3. Unless otherwise noted, for purposes of this policy, “immediate family member” includes: your spouse, your child, parent, brother, sister, grandparent, and these same
relationships of a spouse, by marriage, adoption, or foster arrangement. An immediate family member may also include an individual who has assumed a similar relationship to those above, other than the relationship of spouse*, and for whom the employee or the individual has had financial responsibility for the other. An immediate family member also may include any individual who is a qualified dependent under IRS regulations. The university reserves the right to request documentation establishing financial responsibility or qualifying status as an IRS dependent.

*Due to the 2006 “marriage amendment” to the Idaho Constitution the university, despite the wishes of the Faculty Senate, is unable to include domestic partnerships. [ed. 1-10]

A-4. Separation from employment or the term terminating employee refers to an employee’s separation from all employment.

A-5. A break in State of Idaho service is defined as job termination that is separated by at least three (3) business days prior to re-employment with the university or any other State of Idaho employer.

A-6. Full and part-time employees are eligible for some or all leaves discussed in this policy.

a. Benefit-eligible employees are those who hold a board-appointed position [FSH 3080] and are employed at least half time or greater.

b. Individuals who are employed at least half time or greater as temporary help (TH) and who are expected to complete five (5) months or more of continuous university service and are eligible to participate in the Public Employers Retirement Plan for Idaho (PERSI) are eligible for limited benefits, including annual leave, sick leave and pay for holidays on which they do not work [FSH 3090].

A-7. Leave may not be taken in advance of accrual and may not be taken in excess of 80 hours in a pay period.

A-8. Leave may not be taken on an employee’s first day of employment. If an employee is unable to report for work on their specified first day of employment; employment will not begin until the first day that the employee reports for active duty.

A-9. All employees, including faculty and exempt employees, are responsible for recording all leave taken on bi-weekly time reports and complying with the terms of leave policies, including, but not limited to:

a. completing application for leave and providing medical evidence and other requested information;

b. abiding by any and all return-to-work restrictions; and

c. returning to work following expiration of approved leave.

Failure to uphold these responsibilities may result in absence without approved leave. Eligibility to preserve employment may be affected and/or the employee may be subject to disciplinary action, up to and including termination from employment as provided in appropriate university policies [FSH 3910, 3920 and 3930].

A-10. Employees who are exempt from overtime accrual or payments may be absent from work for approved periods of less than ½ work day without charge to sick or annual leave. Sick, annual or other paid time off must be charged in ½-day increments when ½ day of work or more is not performed, except when alternative work has been performed in conjunction with an approved flexible schedule.
Employees who are not exempt from earning overtime accrual or payments shall record all approved absences in 1/4-hour increments, except when time loss has been made up through an approved flexible schedule.

A-11. Absent written agreement to the contrary, an eligible employee typically earns credit toward retirement plan vesting (see your PERSI, IORP or federal retirement plan document for details) and earns annual and sick leave accruals during the portion of any leave that is paid, except that sick and annual leave do not accrue during terminal leave [J], or in some circumstances during administrative leave [H-5]. An employee typically will not be given such credit for any periods of unpaid leave.

A-12. No break in service will occur during any approved paid or unpaid leave for the purposes of determining eligibility for retiree health benefits.

A-13. Departmental administrators are responsible for approving and ensuring the reporting of leave, via Banner, taken by the employees in their respective units. For procedures regarding reporting and monitoring leave see APM 55.08. The Banner system and Human Resources records are the official university leave records. [ed. 7-10]

A-14. Human Resources is responsible for coordinating requests and reviewing compliance with all types of leave other than sick, annual and medical appointment leave discussed in this section. [APM 55.09] [ed. 7-10]

B. ANNUAL LEAVE.

B-1. Employees receive annual leave based on their classification of employment. [FSH 3080]
   a. Classified Employees on full-time fiscal-year appointments accrue annual leave based on hours worked at the rate of approximately 3.7 hours bi-weekly for the first five full years of service, with a maximum accumulation of 192 hours; 4.6 hours bi-weekly up to 10 years of service, with a maximum accumulation of 240 hours; 5.5 hours bi-weekly up to 15 years of service with a maximum accumulation of 288 hours; and 6.5 hours bi-weekly for more than 15 years of service with a maximum accumulation of 336 hours. [RGPP II.E.3; FSH 3080; APM 55.08 and 55.09] [ed. 7-10]
   b. Faculty on full-time fiscal-year appointments and exempt employees, including postdoctoral fellows, accrue annual leave at the rate of 7.4 hours bi-weekly and may accumulate a maximum of 240 hours. [RGPP II.F.3, FSH 3080, APM 55.09] [ed. 7-10]
   c. Faculty who hold academic-year appointments do not accrue annual leave. Their periods of obligation and leave are governed primarily by the academic calendar, subject to stipulation by the employee’s dean. [FSH 3120]

B-2. Annual leave for classified and exempt appointment of less than 100% full-time, but equal to or greater than half-time, is accrued based on hours worked and at a rate based on the employee’s classification [B-1]. No annual leave is accrued for less than half-time service.

B-3. Temporary employees who are eligible for PERSI accrue annual leave beginning on the first day of employment in an eligible position at a rate of .0462 times hours worked within each bi-week, however leave is not earned until the benefit qualification period has been satisfied.

Annual leave for qualified temporary employees accrues, but is not earned until the employee has worked at least 20 hours per week and for a period of at least five (5) months (the benefit qualification period). Approval to use accrued, but unearned annual leave may be approved by the employee’s supervisor under special circumstances.
However, in the event that accrued annual leave is taken before it is earned and the employee also voluntarily separates or is terminated for cause before annual leave is earned, the value of unearned annual leave taken will be withheld from pay, other earning or payments or must otherwise be repaid to university.

Leave Accrual Example:
Annual leave accrues based only on hours worked.
62 hours worked times .0462 results in 2.90 hours of accrual and may accumulate to a maximum of 192 hours.

B-4. Annual leave accrual is temporarily suspended when the accumulation reaches the maximum allowance. Once the leave accumulation drops below the allowed maximum, accruals resume.

B-5. Employees eligible for overtime earn overtime based on only hours worked. There is no overtime accrual based on annual leave, sick leave, compensatory time, holidays or any other paid time off.

B-6. Annual leave continues to accrue while on any paid leave, except that annual leave does not accrue on hours of compensatory time used; during terminal leave [K]; during academic transitional leave [J] or for temporary employees who accrue annual leave based only on hours worked.

B-7. At the employee’s option, accrued annual leave may be used during any approved leave that could otherwise be taken as sick leave. [RGPP II.I.2.b.]

B-8. Annual leave must be scheduled in advance and requested in writing by the employee. Annual leave may not be taken without the supervisor’s written approval. Both the employee’s vacation preference and business needs of the unit must be considered in establishing mutually agreed periods of leave [APM 55.09]. [ed. 7-10]

a. Supervisors are responsible for coordinating and approving requests for annual leave of all employees in their respective units.
b. An employee on approved annual leave, who becomes eligible to use sick leave through unforeseen events, may use sick leave in lieu of annual leave with approval from his/her supervisor. Documentation to support the use of sick leave may be required.

B-9. Leave balances are paid to employees upon separation (i.e. resignation, retirement layoff, non-renewal, termination) from all State of Idaho employment [IC 67-5334]. Leave balances are transferred from the university to other State of Idaho employers when the university employment ends and a new position is accepted with any State of Idaho employer when there is no break in state service [A-5]. However, the university reserves the right to require an employee to exhaust some or all annual leave prior to any job or employment separation.

Employees separating upon the expiration or termination of a grant will be required to use annual leave before the last day of employment.

In the event of an employee’s death, payment is made to his or her estate.

The effective date of the employee’s separation is the last day on which he or she reports to work for the university, unless the Assistant Vice President (AVP) for Human Resources or designee has approved a written request for alternative termination arrangements that are in the best interests of the university.
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF
Section 3710: Leave Policies for All Employees

A termination extended through the use of accrued annual leave must be approved in advance, in writing, by the AVP for Human Resources or designee and unit administrator and shall be treated as terminal leave. [J and APM 50.20]

In the event that an academic administrator transitions from a position eligible for annual leave to a faculty position in which annual leave does not accrue, balances should be exhausted prior to the start of the new appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding eighty (80) hours must be approved in advance by the AVP for Human Resources, or designee.

B-10. Any individual, regardless of type of appointment, with an annual leave balance who transfers or who is reassigned to another unit within the university may be required to exhaust all existing annual leave prior to starting the new assignment.

B-11. Payment in lieu of annual leave taken for any reason other than separation from employment is granted only by exception or under other special circumstances within the business needs of the university.

B-12. Eligibility requirements for annual leave for temporary help (TH) can be found in FSH 3090.

C. SICK LEAVE.

C-1. Employees that work at least 40 hours in a bi-weekly pay period for at least five (5) consecutive months accrue sick leave. Accrual is approximately 3.7 hours bi-weekly for full-time service. [FSH 3090 C]

C-2. Sick leave accumulation for half-time but less than full-time service is accrued proportionately based on hours worked and earned at the rate of .0462 for each hour worked.

C-3. Sick leave may be accumulated without limit.

C-4. Sick leave cannot be taken in advance of accrual. If, at the end of a bi-weekly pay cycle, absences exceed sick leave accumulation, the hours will be charged to compensatory time first, if available, and then to annual leave. If there is no leave accumulation, time will be unpaid. If sick leave or other types of paid leave are available for an approved absence of any duration, time-off must be taken using available paid leave and may not be taken as unpaid leave, unless such absence has been approved as a personal leave [N] without pay in accordance with the guidelines of this policy [ed. 2-08]

C-5. Sick leave continues to accrue while on any paid leave, except for hours of compensatory time used; during terminal leave; and/or during academic transitional leave [I].

C-6. Sick leave may not be used in lieu of annual leave, except when the conditions of B-8. b. above have been met.

C-7. Sick leave may be taken only as follows:

   a. Illness of Employee. An employee’s own illness, injury, or childbirth-parenting (see FSH 3710 E) that prevents the employee from performing his or her assigned duties; or in the event of exposure to contagious disease if, in the opinion of responsible authority, the health of others would be jeopardized in the work place.
b. **Illness of an Immediate Family Member.** When the illness or injury of an immediately family member as defined in [A-3] of this policy requires the attendance of another, the employee may use his or her own available sick leave.

c. **Death of an Immediate Family Member.** In the event of a death of an immediate family member as defined in [A-3] of this policy; up to fifteen (15) days of sick leave may be used immediately following the event, but can be extended if there are special circumstances. The unit administrator and the AVP for Human Resources or designee may approve an extension of leave for up to a total of thirty (30) days of sick leave.

d. **Death of a Family Member.** Sick leave usage for the death of a family member other than a member of the immediate family as defined in [A-3] of this policy is limited to a maximum of five (5) days of sick leave immediately following the event.

e. **Medical Appointments.** Personal or family appointments for medical, dental, optical treatment or examination, or meeting with an Employee Assistance Program professional, including time for travel to and from such appointments. An employee is allowed up to two hours of time off per month for such appointments without charge to sick leave provided satisfactory arrangements have been made with the employee’s supervisor. If the employee has absences totaling more than two hours in a month, such absences must be reported and charged to sick leave. There is no carryover balance from month to month.

f. **Parenting/Adoption.** Up to ten (10) days of sick leave may be used during an approved family medical leave for either parent for parenting as defined in L-5 of this policy. In the case of adoption, the child must be younger than 18 years of age and may not be a stepchild.

f. **Organ Donation.** Full- and part-time benefit eligible employees may use up to five (5) days of sick leave for bone marrow donation and may use up to thirty (30) days of sick leave to serve as a human donation organ donor during an approved family medical [L] or personal leave [N]. [ed. 2-08]

C-8. Attendance at work is a job requirement for all positions at the university. Excessive absenteeism can affect job performance. Supervisors have the right to set attendance standards and require medical evidence to support absences that exceed these standards. Absences that occur during an approved family medical leave [L] are exempt from these requirements.

C-9. The federal Family Medical Leave Act of 1993 (FMLA) was adopted as law to protect the best interest and job security of employees. The university may initiate family medical leave (FML) and will apply FML concurrently with sick leave when the employee’s own illness, work-related injuries, or an illness of a family member is covered by FML. In these circumstances, sick leave must be used before unpaid FML is taken [L-2].

C-10. An employee may be eligible for FML after three (3) consecutive days of sick leave, unpaid or other absence [L-4] and may initiate a request for FML at any time prior to an absence which they suspect may qualify. However, the university may also initiate FML and will typically take steps to determine if an absence qualifies as FML when an employee has missed five (5) consecutive workdays or longer by providing the employee with an absence questionnaire and FML application. A failure to comply with a request to complete the absence questionnaire and/or the FML application (if applicable) may result in absence without pay and/or disciplinary action, up to and including dismissal from employment as provided in relevant university policies [FSH 3910, 3920 and 3930].

C-11. Employees transferring without a break in service from a qualified Idaho state agency or from the university to another state agency will be credited with their accrued sick leave by the receiving agency. All unused sick leave is forfeited when an employee is separated from state service. No compensation is made for such unused leave, except as provided in C-12 in
C-12. Employees who retire and then return to work at the university may not be entitled to reinstatement of sick leave balances. In this instance, only the unused portion of sick leave that was converted at the time of retirement [C-13 and FSH 3730 C] to pay for retiree health benefits may be reinstated for employees who separate for retirement purposes and later return to work at the university.

C-13. An employee who retires under the eligibility conditions for retirement or disability retirement as stated in FSH 3730 may apply a pre-determined amount of unused sick leave accrued since July 1, 1976, as payment for continued coverage under the university retiree health program. [FSH 3730, APM 55.39] [ed. 7-10]

D. HOLIDAYS.

D-1. The university is closed at least eleven (11) holidays each fiscal year. [3460 F-2]

D-2. Board-appointed employees [FSH 3080] and temporary help employees participating in PERSI [FSH 3090] are eligible to receive holiday pay. [ed. 2-08]

D-3. Benefit-eligible employees [A-6.a.] who are employed full time (87.5 percent or greater) receive holiday pay based on eight (8) hours for each holiday. An employee who works a compressed work schedule to include more than eight (8) hours each day, such as four (4) ten-hour workdays in one week, will still receive only eight (8) hours of holiday pay. With supervisor approval, the employee may make up the difference between their regular hours of work and the holiday pay for that day (two [2] hours in this example) through a flexible work schedule within the same work week [FSH 3460], or may use accrued compensatory time or annual leave, or take the time as unpaid.

D-4. Benefit-eligible employees [A-6.a.] who are employed at least half time but less than full-time, are entitled to receive holiday pay, pro-rated based on the average number of hours scheduled each week. The number of hours scheduled on a routine basis (not the hours worked in the week in which the holiday falls) is divided by five (5) days. For example:

20 hours per week / 5 = 4 hours of holiday pay
25 hours per week / 5 = 5 hours of holiday pay
30 hours per week / 5 = 6 hours of holiday pay

D-5. The university embraces diversity and recognizes that our workforce is derived from many diverse cultures to include many different religious preferences. An individual may be absent from work to observe a religious holiday consistent with his or her own religious beliefs and practices when the day is not consistent with the university’s official holidays, provided advance notice is given. Pay for these absences are as follows:

a. Benefit-eligible employees may use their accrued compensatory time or annual leave to receive pay for an observed religious holiday that is not an official university holiday.

b. Employees who are not benefit-eligible, or who do not have compensatory or annual leave available, may observe the holiday without pay; or, with advance supervisory approval, employees may make up the hours in the same work week [FSH 3460].
D-6. Benefit-eligible employees are entitled to holiday pay while they are on other approved paid leave, or during any portion of paid or unpaid family medical leave.

E. PARENTING LEAVE.

E-1. Employees who meet FMLA eligibility requirements (see FSH 3710 M-3) are entitled to 16 weeks of job protected leave with continuation of group health insurance coverage within 12 months of the birth, adoption, or foster placement of a son or daughter. All Parenting Leave allowed under this Section E is considered Family Medical Leave.

Son or daughter means a biological, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis, who is either under age 18, or age 18 or older and “incapable” of self-care because of a mental or “physical disability” at the time of the FMLA leave request.

E-2. If both parents are employees of the university each is entitled to take the same amount of parenting leave as allowed for a single employee.

E-3. Employees can choose to use a combination of accrued paid leave or unpaid leave. Employees must first use accrued sick leave (see FSH 3710 M-2) before going on leave without pay. The remainder of the job protected leave will be unpaid, unless the employee chooses to use a combination of accrued annual leave, or compensatory time, or shared leave (if eligible see 3710 L).

E-4. After all of a parent’s leave is exhausted, and with approval from both affected units, one parent may transfer annual leave to the other parent to extend the paid benefit time during parenting leave.

E-5. Employees are encouraged to familiarize themselves with FMLA guidelines before requesting or granting Parenting Leave. “Fact Sheets” that explain FMLA (numbers 28 through 28M) may be found on the United States Department of Labor Wage and Hour Division website. The Parenting Leave described in this section E. is intended to encompass the University’s obligation to provide Family Medical Leave under the federal Family Medical Leave Act for the birth or placement of a son or daughter for foster care or adoption as described in sub-sections M-1.a and M-1.b of this policy. Parenting Leave under this Section E. may exceed the requirements for the Family Medical Leave described under sub-sections M-1.a and M-1.b of this policy, but Parenting Leave must, at a minimum, comply with the requirements of the Family Medical Leave Act as set out in Section M of this policy.

E-6. Leave may not be used for both foster care and adoption consecutively if foster placement leads to the adoption of the son or daughter.

E-7. Alternate or reduced work schedules are addressed in FSH 3710 M-13 b.

E-8. See FSH 3710 R-1 for exceptions to University leave policies.

E. MILITARY LEAVE.

E-1. Faculty and staff, regardless of whether or not they hold a fiscal-year or academic-year appointment are eligible for leave of up to fifteen (15) working days in a twelve (12) month period for active duty or military training. Leave for State of Idaho military duty or training is limited to fifteen (15) days within a calendar year. Employees who are in board-appointed positions [FSH 3080] are eligible for paid military leave. When called to active duty or training, the university will pay the difference between military pay received from the U.S. or State government, but cannot duplicate pay. This is accomplished by full pay
during an approved military leave. The employee must provide documentation of military pay received during leave, within ninety (90) days of return from leave or upon earlier job separation. The employee is required to repay to the university any amount which exceeds their regular base pay for the same period. Unpaid military leave may be requested if the employee knows their military pay will exceed their university pay. Annual and sick leave credit towards length of service for retirement plan, and other vesting will continue to accrue during the fifteen (15) working days of military leave and eligibility for employee health benefits will continue whether military leave is requested with or without pay. An employee at their own option may instead request annual leave on the same basis as any other vacation or other time off and if approved, may use annual leave and retain full military pay. [APM 55.09 and 55.38] [ed. 7-10]

**EF-2.** Any employee who is called to active duty and/or is required to serve more than fifteen (15) working days is eligible for up to five (5) years of military leave. Eligibility for employee health coverage will continue at a minimum through the first thirty (30) calendar days of service while on an approved military leave. The employee will be required to pay the employee share of the health care costs, as well as the costs for his/her dependents.

**EF-3.** An employee may use annual leave and/or accrued compensatory time for military service and continue to receive pay and benefits before commencement of military leave.

**EF-4.** Military leave beyond the first fifteen (15) working days is generally granted without pay and benefits. Health care coverage will end for the individual who is called to active duty after the first thirty (30) days of service. However, coverage for his/her dependents may continue for up to an additional six (6) months, provided that the employee has made arrangements with Benefit Services to pay the full cost of coverage, on at least a monthly basis. In this instance, any other coverage provided by U.S. military programs will be primary.

**EF-5.** When on military leave or when his/her dependents are not eligible for coverage elsewhere, the employee or his/her dependents, individually or as a family, may be eligible to continue health care coverage through COBRA.

**EF-6.** An employee may elect to continue group life insurance benefits in effect for the employee or his/her dependents on the date the employee is called to active duty for a maximum period of thirty (30) days. However, the employee must self-pay the full cost, based on rates and eligibility rules afforded to others who are actively at work. Benefits from these programs generally exclude losses resulting from participation in a military organization or from an act of war. An employee may also have the right to life insurance portability or conversion to an individual life insurance policy following termination of benefits in the group plan.

**EF-7.** Upon reinstatement, the employee’s health plan will resume as if their employment had not been interrupted.

**EF-8.** In accordance with state and federal law, an employee upon return will be reinstated to his/her former position or a comparable position without loss of seniority, status or pay rate provided the employee returns with an honorable discharge and within five (5) years from departure date from the university.

a. In some situations, re-employment may not be possible, such as when there has been a significant change in circumstances, if re-employment would impose an undue hardship on the university or department, or if the person’s employment was temporary in nature,
such as positions that are grant-funded for a specific duration and/or temporary help (TH) positions.

1. If the returning employee's skills need upgrading to meet the requirements for a prior or promoted position, the university will make reasonable efforts to refresh or update these skills unless such efforts would create undue hardship for the university.

2. When an employee with a service-related disability is not qualified to perform the essential functions of his/her job after the university has made reasonable efforts to accommodate the disability, the employee may be placed in another position of comparable pay, rank, and seniority.

b. Employees returning from military leave must provide the university with written timely notification of intent to return to their position. The university may require documentation that the person’s application for reemployment is timely and that the person’s discharge from uniformed services was under honorable conditions. University procedures will follow the applicable state and federal law, including but not limited to the Uniformed Services Employment & Reemployment Rights Act (USERRA), 38 U.S.C. 4301-4333, enforced by Department of Labor’s Veterans’ Employment & Training Services (VETS) (www.dol.gov/vets.)

EF-9. Retirement benefit contributions are suspended while the employee is on unpaid military leave. Upon reinstatement after military leave, reenrollment in the retirement plan will be immediate.

a. Credited state service continues during military leave as though no break in employment has occurred.

b. The employee may elect to make up any employee contributions missed during an approved military leave. Such contributions must be paid into the plan within a period not to exceed three (3) times the length of the military leave, up to a maximum of five (5) years.

c. The university will contribute the regularly scheduled match contributions for any employee make-up payments made in connection with an approved military leave.

d. For purposes of determining eligibility for retiree health coverage, military leave will not count as a break in service provided that re-employment occurs within the parameters of this policy. Further, an employee will receive university service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] during the fifteen (15) days of approved paid military leave; however, the employee will not receive service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] for any unpaid military leave.

EF-10. The university will not discharge an employee without cause, as that term is defined by federal USERRA regulations, who is reinstated under the provisions of the USERRA and has served thirty-one (31) to one hundred and eighty (180) days without cause for six (6) months following reinstatement. If the length of military service was more than one hundred and eighty (180) days, but less than five (5) years, the employee will not be discharged without cause for one (1) year following reinstatement.

E-11. This policy is intended to comply with applicable state and federal laws, including the Uniformed Services Employment and Reemployment Rights Act (USERRA) of 1994. To the extent that any provision of this policy is ambiguous and/or contradicts the Act or any other law, the applicable law or Act will prevail.

GE-1. LEAVE FOR COURT REQUIRED SERVICE AND VOTING.

GE-1. Any employee who is summoned for jury duty or subpoenaed as a witness before a court of competent jurisdiction or as a witness in a proceeding before any federal or state
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF

Section 3710: Leave Policies for All Employees

行政机构将被授予休假。受益雇员将被授予有薪休假，除非根据F-2项规定。与该职责相关的旅行费用不需由大学报销。[RGPP II.I.5.a.2; APM 55.09] [ed. 7-10]

GF-2. An employee must request annual leave or personal leave without pay for the following:

a. appearing as a party in a non-job-related proceeding involving the employee;

b. appearing as an expert witness when the employee is compensated for such appearance;

c. appearing as a plaintiff or complainant, or as counsel for a plaintiff or complainant, in a proceeding in which the Board of Regents or any of its institutions, agencies, school or office is a defendant or respondent. [RGPP II.I.5.a.]

GF-3. Polling places are typically open extended hours and absentee voting is widely available. However, employees who are unable to vote outside of scheduled hours will be allowed time off to vote. If available, an employee may use accrued annual leave, compensatory time or, if approved in advance, may be able to make up time lost to vote within the same work week [FSH 3460] through a flexible work schedule. Otherwise, time off will be approved, but unpaid.

HG. LEAVE FOR CAMPAIGNING FOR OR SERVING IN PUBLIC OFFICE.

HG-1. The president approves requests for leaves of absence for the purpose of campaigning for or serving in public office [RGPP II. I.5.c.]. See FSH 6230 E for provisions concerning leave for campaigning and serving in public office.

HG-2. It is the Board of Regent’s intent that state salary not be duplicated to an employee serving as a member of the Idaho Legislature. Any leave for serving as a member of the Idaho State Legislature will be unpaid when the Legislature is in session [RGPP II.I.5.c.2.]. Certain benefits may continue during the unpaid leave; however, the employee must pay the full cost of coverage.

IH. ADMINISTRATIVE LEAVE.

IH-1. Administrative Leave is leave with pay and benefits. An employee will continue to receive pay and leave accruals in accordance with their regular rate and maintain eligibility for other benefit programs. (Terminal leave (J) and academic transitional leave (I) are not considered administrative leave.)

IH-2. At the discretion of the president or his/her designee, an employee may be granted administrative leave when the state or the university will benefit as a result of such leave. [RGPP II.I.5.d; 3470 B] [ed. 7-10]

IH-3. Examples of circumstances that may qualify an employee for administrative leave are volunteer fire fighters attending class off campus, official delegates to the annual general convention of Idaho Public Employees’ Association, and members of state or local committees, such as the Human Rights Commission, attending official meetings.

IH-4. With the approval of the president or designee, an administrator may also use administrative leave to remove an employee from the workplace (for example during an investigation or to mediate an employee relations issue), if approved in advance by Human Resources. The President’s Office or Provost’s Office, as appropriate must be notified.
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IH-5. In all cases involving administrative leave with a duration that is more than one bi-week, an electronic personnel action form (EPAF) must be processed. When leave is less than one full bi-week, hours attributed to administrative leave shall be coded as “ADL” on the time/leave record and in the payroll system.

IH-6. In the absence of a written agreement to the contrary, an employee on administrative leave must be available for recall to work during regular university business hours in the event that the employee’s services are required or he/she is otherwise requested to return to work.

IH-7. Under certain circumstances, the university may require the use of accrued annual leave and/or compensatory time.

II. ACADEMIC TRANSITIONAL LEAVE.

II-1. Academic transitional leave may apply when an academic administrator steps down from his/her administrative appointment and assumes a faculty appointment. The purpose of academic transitional leave is to prepare the employee for a new faculty appointment. Transition leave is not available in the event of transition from academic faculty to an administrative appointment. Academic transitional leave is granted at the discretion of the university, must be approved by the provost, and approved by the president or designee.

II-2. There is no accrual of annual leave during the period of academic transitional leave. All other benefits and leave accruals are provided on the same basis as afforded to similarly situated employees in a faculty job classification. Annual leave balances should be exhausted prior to a new academic faculty appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding eighty (80) hours must be approved in advance by the AVP for Human Resources or designee.

KJ. TERMINAL LEAVE.

KJ-1. Terminal leave is paid leave received by a terminating employee in lieu of wages at the employer’s discretion. An example of terminal leave is leave paid to an employee who is not completing the term of his/her contract at the request of the employer. Sick and annual leave is not accrued during the terminal leave period. Time toward length of service for retirement vesting and eligibility for university retiree health benefits [FSH 3730] will continue. The duration of terminal leave is determined at the discretion of the university.

KJ-2. During terminal leave, health benefits continue for an employee and his/her covered family members on the same basis as employees of the same classification who are actively at work. The employee’s share of all health care contributions, including employee and dependent medical/dental, supplemental life, and/or any other costs of coverage, will be withheld from the employee’s pay. Upon separation from employment, the employee and/or his/her covered family members, as a family or individually, may have rights to medical/dental coverage through COBRA.

KJ-3. The university may require the use of accrued annual leave and/or compensatory time during the terminal leave period or may pay out some or all accrued, but unused balances at the time of termination.

LK. SHARED LEAVE.

LK-1. University employees [who earn annual leave] may donate annual leave hours to shared leave a fellow employee who has an extraordinary need for leave. Annual leave donated
LK-2. Eligibility. Benefit eligible employees, including academic year faculty who do not accrue annual leave, are eligible to receive shared leave.

a. Qualifying Events. If any benefit-eligible employee who has a health condition \[KL-2.a.1\] or whose immediate family member has such a condition and the employee is required to take time away from work, and has exhausted all leave, the employee may apply for shared leave when time away from work is a qualified absence as described below (KL-2.a.1) but will not be compensated by paid leave or wage replacement programs such as disability and workers’ compensation benefits.

1. The health condition of the affected individual must be certified by a competent health care provider to be considered as acceptable evidence by the university, and qualify as a serious health condition as defined by family medical leave to include a need resulting from human organ or bone marrow donation. This provision applies only to the acceptable medical conditions of family medical leave. An employee need not meet the service and other requirements of family medical leave to be considered as an absence eligible for shared leave.

2. Shared leave may be requested for routine pregnancy-related disability and complications of childbirth and pregnancy, but not for parenting or parent-child bonding. Sick leave benefits for eligible employees may be available for parenting [C-7.f.].

3. An applicant for shared leave who has used his or her own annual leave for purposes other than attending to a medical condition that is known to create potential for an extraordinary need for leave typically is not eligible for leave from the shared leave pool. Under extraordinary circumstances, such an applicant may request an exception to receive shared leave from directed donations.

4. Shared leave that is donated from the shared leave pool is intended for use by employees who intend to return to work. An applicant who wishes to receive shared leave and otherwise meets the criteria of the program and does not intend to return to work may apply for shared leave; however, shared leave in this instance is available only from donations directed specifically to that one recipient.

b. Prerequisites. An employee must have used all other available leave such as sick leave, annual leave, and compensatory time to qualify as a recipient of shared leave.

c. Disability Income. To be eligible for shared leave for the employee’s own medical condition, employees must first apply for wage replacement benefits that may be available through workers’ compensation or disability coverage. Once such benefits begin eligibility for shared leave benefits end. However, an otherwise eligible employee may use shared leave while satisfying the waiting period or after exceeding maximum disability periods for income replacement programs.

LK-3. Donating Shared Leave.

a. Employees who have an accrued annual leave balance may donate to shared leave regardless of their funding [TA5] source. Donations may be made to the shared leave pool and accessed by any eligible recipient or donated directly to a specific shared leave recipient.

b. Shared leave donations are restricted to direct donation when the donor’s annual leave balance is less than forty (40) hours from the maximum leave accumulation limit. In this
instance only, the amount of leave actually used by the recipient will be deducted from the donor’s account before any balance is taken from the shared leave pool. Donated leave not used by the recipient will be returned to the donor’s account or forfeited if the maximum accrual has been reached. Donors can choose to designate any unused direct donations to be added to the general shared leave pool.\[ed.\ 7-11\]

c. Leave donations made for a specific individual will be drawn from donors’ accounts based on a first-received basis. The first donation request received by Benefit Services will be processed before a second donation from other recipients or before hours are withdrawn from the shared leave pool. Donations will be drawn from the donor’s annual leave account as the time is transferred and used by the recipient. No leave donation in excess of the recipient’s shared leave needs will be taken, unless contributions to the shared leave pool also have been authorized, except as noted above in section b., when donations to the shared pool are restricted.

d. Leave donations may be made in any amount of not less than ½-hour (.50) increments.

e. Shared leave donations may not cause the donor’s annual leave balance to fall below forty (40) hours at the time the donation is processed, unless the donor is terminating active employment from the University. Donors should be aware that any shared leave not used by the intended recipient will be returned to the Shared Leave Pool, not returned to the donor(s).


a. Maximum Benefit. The maximum shared leave benefit is limited to four (4) working weeks of leave within a rolling twelve (12) month period. Shared leave hours that are granted will be reflective of the employee’s regular percentage of appointment.

b. Shared leave requests are reviewed and granted by the Director of Benefit Services or designee in accordance with this policy. Applicants awarded shared leave will be notified in writing; if the request is denied, the reason(s) for denial shall also be stated in writing. The requestor may appeal a denied request for shared leave. Appeals must be made in writing to the AVP for Human Resources within thirty (30) days from the date of denial and must reference the applicable sections of policy and reasons why there is disagreement. The AVP for Human Resources will respond to appeals within thirty (30) days.

LK-5. Funding and Conversion.

a. Donation Conversion. Hours of donated shared leave are multiplied by the hourly rate of the donor; that amount is recorded as a deposit to the shared leave pool or the directed recipient’s account and subtracted as hours from the donor’s annual leave balance.

b. Recipients Conversion. The recipient’s hours of shared leave need is multiplied by the recipient’s hourly rate and subtracted from the shared leave pool.

Sick leave is a liability that is funded only through base salary. Funding for a full year of base salary is provided for most positions. If an employee is absent without pay the department typically has received funding for the duration of the employee’s full appointment and would achieve salary savings as a result. The only exceptions would apply to those working from certain special funding sources or who hire a temporary replacement during the period of unpaid leave. Consequently, the department of the employee who will receive shared leave is responsible for funding the pay its employee will receive during leave from shared leave donations.

c. Donors may donate annual leave regardless of their salary-funding source. The department or sponsored research project gains the hours the employee would have taken for annual leave when their employee makes a donation.
ML-1. Family medical leave may be requested by an eligible employee for the following reasons:

a. the birth of a son or daughter of the employee and in order to care for such son or daughter, adoption or foster care placement of a child (see FSH 3710 E);

b. parenting to care for or bond with a child within twelve (12) months following the birth, adoption or foster care placement of a child, the placement of a son or daughter with the employee for adoption or foster care;

eb. to care for an immediate family member as defined in [A-3] of this policy with a serious health condition as defined in [LM-5] of this policy;

cd. because of the employee’s own serious health condition [ML-5]; or
de. to serve as a human organ or bone marrow donor.

The entitlement to leave under subparagraphs (a) and (b) of this section M-1 for a birth or placement of a son or daughter is encompassed in the Parenting Leave described in Section E, of this policy. All leave taken under Section E. Parenting Leave shall be considered Family Medical Leave.

ML-2. Family medical leave and/or servicemember family medical leave is leave without pay. However, when the absence also qualifies for the use of sick leave, if available, sick leave must be used first in conjunction with family medical leave before any period of unpaid absence. Once sick leave has been exhausted or when the type of absence does not qualify for the use of sick leave, the entire absence or remainder of the approved family medical leave will be unpaid, unless the employee chooses to use any combination of compensatory time, annual leave, or shared leave (if eligible; KL). [rev. 2-08]

ML-3. Eligibility. If the employee has been employed by the university for a minimum of twelve (12) months and has worked at least 1250 hours during the previous twelve (12) month period prior to the requested leave, the employee is eligible for family medical leave.

ML-4. Length of Leave. A maximum of up to twelve (12) weeks or a total of 480 hours of family medical leave may be granted to eligible full-time employees during a rolling twelve (12) month period. Eligible part-time employees may be granted up to twelve (12) working weeks of leave or a total number of hours consistent with their regular work schedule within a twelve (12) week period. (i.e. 20 hours per week x 12 weeks = 240 hours). The period is measured from the date the employee last used/exhausted family medical leave or became employed by the university to the date leave is to begin. Family medical leave may be taken on a continuous, intermittent, or reduced-hour basis.

When both parents are university employees, family medical leave taken for childbirth/parenting consists of a single benefit of up to a total of twelve (12) weeks for either parent (but not both parents, see L-15) or the single benefit may be shared between the parents. Up to ten (10) days of sick leave may be available to either parent for “parenting” (the bonding period after child birth related disability or for a non-birth mother or father.

ML-5. Definitions.

a. “Serious health condition” is defined as an illness, injury, impairment or physical or mental condition that involves any period of incapacity or treatment connected with inpatient care (i.e. overnight stay) in a hospital, hospice, or residential medical-care facility,
and any period of incapacity or subsequent treatment in connection with such in-patient care; continuing treatment by a health care provider, which includes any period of incapacity (i.e. inability to work, attend school, or perform other regular daily activities) due to a health condition (including treatment for or recovery from) lasting more than three (3) consecutive days; and any subsequent treatment or period of incapacity relating to the same condition, that also includes:

1. treatment two (2) or more times by or under the supervision of a health care provider; or one treatment by a health care provider with a continuing regimen of treatment; or
2. pregnancy or prenatal care. A visit to the health care provider is not necessary for each absence; or
3. chronic serious health condition, which continues over an extended period of time, requires periodic visits to a health care provider, and may involve occasional episodes of incapacity (e.g. asthma, diabetes). A visit to a health care provider is not necessary for each absence; or
4. permanent or long-term condition for which treatment may not be effective (e.g. Alzheimer's, a severe stroke, terminal cancer). Only supervision by a health care provider is required, rather than active treatment; or
5. absences to receive multiple treatments for restorative surgery or for a condition which would likely result in a period of incapacity of more than three days if not treated (e.g. chemotherapy or radiation treatments for cancer).

6. “Parenting” is defined as the period of bonding that occurs within the first twelve (12) months of the birth, adoption or foster placement of a child in the family and ends twelve (12) months after birth or placement of an adopted or foster child for either parent. An employee who has given birth may be eligible for family medical leave related to child-birth disability and may continue leave followed by a period of bonding or parenting which begins at the expiration of the disability of the birth mother and/or child if applicable. Up to ten (10) days of sick leave may be used by either parent for the bonding/parenting period (C, E-7 and L-3).

An eligible employee includes any employee who meets all of the following criteria:

1. has completed twelve (12) months of service with the university, and
2. has worked at least 1250 hours during the twelve (12) month period prior to the commencement of the requested leave, and
3. returns to work from the approved leave for at least thirty (30) calendar days.

Health benefits continued during family medical leave on the same basis as for any similarly situated employee who is actively at work, regardless of whether the employee is using other forms of accrued leave or taking leave unpaid. The employee’s share of cost for health coverage is the amount that is typically payroll-deducted for the employee’s own coverage and/or coverage for his/her dependents. The employee is responsible for payment of these amounts during leave. Payroll deductions will be continued for any portion of the leave that is paid. During any portion of leave when no pay is received, the employee must make arrangements to self-pay these amounts. Retirement plan contributions, accruals for sick and annual leave and credit toward vesting are suspended during unpaid portions of family medical leave.

All qualified absences, including those due to a work-related injury, will be considered as family medical leave.
ML-8. If there are reasonable circumstances to support that an employee’s absence qualifies as family medical leave, the university has the right to classify such absence as family medical leave.

ML-9. When the need for family medical leave is foreseeable, an employee must request an application for family medical leave at least thirty (30) days in advance of the need for leave. Application assistance is available from Benefit Services. When events are not foreseeable, employees must provide as much notice as is possible. Application for family medical leave after a return from absence is not recommended; rights to preserved employment and benefits may be adversely affected. In any event, absent extraordinary circumstances, an employee may not claim an absence as a qualified family medical leave event unless done so within the first two (2) days of return from an absence.

ML-10. When leave is taken for personal illness or to care for an immediate family member with a serious health condition, leave may be continuous or intermittent and may include a reduction in hours worked. For intermittent leave, the employee must provide certification from the health care provider caring for the employee and/or family member stating the leave must be taken intermittently. Employees needing intermittent leave must attempt to schedule their leave so as not to disrupt university operations. The university reserves the right to assign an employee to an alternative position with equivalent pay and benefits that better accommodates the employee’s intermittent or reduced leave schedule.

ML-11. Employees on family medical leave are required to provide documentation to Benefit Services as requested, including intent to return to work. During leave, the university may require an employee to re-certify the medical condition that caused him/her to take leave. A return-to-work release from the health care provider is required before an employee absent due to his or her own serious health condition may return to work.

ML-12. Family medical leave requests for medical treatment or care giving requires certification from the health care provider documenting medical necessity.

ML-13. Family medical leave requests for parenting must be approved in advance and completed within twelve (12) months of the birth, adoption, or foster care placement of a child.
   a. Shared leave under L of this policy may not be used for the purpose of parenting; however, Shared leave (if granted) may be used for the disability period related to childbirth.
   b. Intermittent leave or reduced work schedule requests for parenting may not be granted, or may be cancelled by the university with thirty (30) days written notice, based on business needs of the university.

ML-14. Family medical leave taken by two (2) university employees to care for a new born child or child placed for adoption or foster care or to care for a family member who has a serious health condition consists of a maximum twelve (12) weeks of leave for each employee. Family medical leave for parenting is addressed in FSH 3710 E.

ML-15. If the university obtains information from a credible source, such as the workers’ compensation authority, disability carrier, or a medical practitioner, that alters, changes, casts doubt, or fails to support continued leave or the leave application, the university has the right to:
   a. revoke leave;
   b. not grant leave;
   c. require new evidence to support the leave request;
   d. require the employee to return to work if the leave is not substantiated; and/or
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e. when appropriate under applicable employee discipline policies [FSH 3910, 3920, and 3930], take disciplinary action, up to and including dismissal.

MI-16. Upon return from family medical leave, employees will be assigned to their same or similar position with equivalent pay and status with or without reasonable accommodation, as appropriate, in accordance with the Americans with Disabilities Act. Job reassignment must be coordinated with Employment Services and approved by the AVP for Human Resources or designee. The university has no obligation to restore employment to temporary hourly (TH) or other employees if the employment term or project is over and the university would not otherwise have continued employment.

MI-17. Family medical leave is not intended for individuals who do not plan to return to work. An employee who applies for and is granted family medical leave and fails to return to work for at least thirty (30) days upon the expiration of their family medical leave period may be obligated to repay the costs of health coverage provided by the university during any portion of family medical leave. If the university is notified that the employee does not intend to return to work, the family medical leave period will terminate immediately and the employee will be separated from employment on that date. Medical, dental and under some circumstances Health Care Spending Accounts may be continued through the Consolidated Omnibus Budget Reconciliation Act (COBRA). Options for life insurance portability or conversion may also be available. Job separation under these circumstances will result in a lump sum payment of annual leave and/or compensatory balances. In addition, the employee will no longer have a right to restoration to the same or equivalent position. The employee is responsible for contacting Employment Services to arrange for an exit interview.

NM. SERVICEMEMBER FAMILY AND MEDICAL LEAVE. The federal Family and Medical Leave Act (FMLA) now entitles eligible employees to take leave for covered family member’s service in the Armed Forces (Servicemember Family and Medical Leave) in two instances. This section of the policy supplements the above family medical leave policy and provides general notice of employee rights to such leave. Except as stated below, an employee’s rights and obligations to servicemember family and medical leave are governed by the general family medical leave policy. [add. 2-08]

NM-1. Definitions: The following definitions are applicable to this section of the policy.

a. “Eligible employee” is a spouse, son, daughter, parent, or for purposes of caring for a family member, the next of kin of a covered family member.
b. “Next of kin” is the nearest blood relative of a family member who is in the Armed Forces.
c. “Covered family member” means any family member who is a member of the Armed Forces, including a member of the National Guard or Reserves, regardless of where stationed and regardless of combative activities.

NM-2. Leave Entitlement: Eligible employees are entitled to take servicemember family and medical leave for any one, or for a combination of the following reasons:

a. Any “qualifying exigency” (as defined by the Secretary of Labor) arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty or has been notified of an impending call or order to active duty in the Armed Forces in support of a “contingency operation,” and/or
b. To care for a covered family member who has incurred an injury or illness in the line of duty while on active duty in the Armed Forces, provided that such injury or illness may render the covered family member medically unfit to perform duties of the family member’s office, grade, rank or rating.
NM-3. Duration of servicemember family and medical leave:

a. When leave is due to a qualifying exigency: an eligible employee may take up to 12 work weeks of leave during any 12-month period.

b. When leave is to care for a covered family member: an eligible employee may take up to 26 work weeks of leave during a single 12-month period to care for the covered family member. Leave to care for a covered family member, when combined with other qualifying family medical leave may not exceed 26 weeks in a single 12-month period.

c. Concurrent leave: servicemember family and medical leave runs concurrent with other leave entitlements provided under federal, state and local law.

ON. PERSONAL LEAVE. [ren. 2-08]

ON-1. Any employee not covered by another university leave type within this policy may request a personal leave of absence.

ON-2. Personal leave is leave without pay and without benefits. However, the supervisor may require the use of sick, annual or any other type of accrued leave if the absence qualifies and leave is available. Personal leave may be taken with pay and benefits when other paid leave such as annual leave is taken concurrently. In rare circumstances, leave may be approved without pay, with continued benefits, but only when approved as an exception and only when doing so meets the business needs of the university. Hiring units are responsible for funding the benefits under these circumstances. [APM 55.38] [ed. 7-10]

ON-3. Reasons for requesting a personal leave may include, but are not limited to, religious, personal, and educational matters or for extension of any leave when all other leaves have been exhausted.

ON-4. All requests for personal leave must be made to the supervisor in writing. A leave of three (3) working days or less can be approved by the supervisor and are recorded by the timekeeper on the employee’s time record as LWB. The president or his/her designee (i.e., provost) must approve a personal leave which exceeds three (3) working days. Personal leave is not guaranteed and is granted on a case-by-case basis, with the approval of the supervisor and the unit administrator, based on the business needs of the university.

ON-5. The president or designee (i.e. provost) may grant personal leave without pay with or without benefits for a period of up to one (1) calendar year, with extensions not to exceed a total of three (3) successive calendar years [RGPP II.I.5.c.1]. Consideration is given to such requests on an individual basis in the light of the reason for which it is requested, whether it is leave with or without paid benefits and the effect that granting it will have on the employee’s unit or program.

ON-6. When a personal leave of absence is granted, the university assures reinstatement of the individual to a position of similar status and pay, but only to the extent that such position continues to exist and would have continued to exist had no leave been taken. Return to work in the same job within the same department is not promised.

ON-7. During personal leave without pay an employee is not eligible for holiday pay, the accrual of sick or annual leave, or the use of medical appointment leave, and may not be granted any other type of leave of absence such as family medical or military leave until the employee has first returned to work under active status and otherwise qualifies for such leave.
ON-8. An employee who has received approval from the president or his/her designee for a personal leave without pay without paid benefits may continue to contribute toward and receive the benefits of the institution’s insurance and retirement programs, if the laws, rules, regulations, policies and procedures governing the administration of such insurance and retirement programs permit. [RGPP II.I.5.c.3]. Employees should consult Benefits Services for more detailed information on how personal leave without pay will impact their benefits and their rights to continue coverage through COBRA and life insurance conversion or portability. [APM 55.09 and 55.38] [ed. 7-10]

ON-9. Employees who are granted a personal leave of absence without pay are responsible for making arrangements with Benefit Services, before the leave begins, for the continuation or discontinuation of benefits. Also, they should call Benefit Services on their return to active status to make sure that any benefits that had been discontinued are reinstated or to adjust for changes that occurred while they were on leave. [APM 55.38] [ed. 7-10]

ON-10. Personal leave is not intended as a vehicle to continue benefits for periods when employees are not working due to academic or seasonal work schedules or for a reduction in hours.

PO. EXTENDED FAMILY MEDICAL LEAVE. [ren. 2-08]

PO-1. Extended family medical leave (EFML) extends job protection and health benefits beyond the expiration of family medical leave. EFML is intended for the following:

- a. Individuals who plan to return to work and have a prognosis to support return to work with assumption of full duties and responsibilities of their position, with or without reasonable accommodation, within a total absence period of no more than twelve (12) consecutive months; or
- b. Individuals who do not have an acceptable prognosis to return to work, but whose absence qualifies for the use of sick leave and who have an unused sick leave balance upon the expiration of family medical leave.

PO-2. EFML and other options for an employee’s return to work following an approved family medical leave must be coordinated through Benefit Services, approved by the supervisor, and are granted at the discretion of the university, but are not guaranteed. EFML may not exceed nine (9) consecutive months. [ed. 2-08]

PO-3. Acceptable medical certification and/or other documentation to support a prognosis for return to work must accompany all requests for EFML. If acceptable medical certification and/or other documentation are not provided, notice of contemplated job action to separate the employee from employment at the expiration of family medical leave may be served upon the employee if all sick leave has been exhausted.

PO-4. If there is not a prognosis to return to work as defined above [O-1], notice of contemplated action for job separation will be issued. However, if the employee has a remaining sick leave balance and his/her condition qualifies for the use of sick leave, employment and EFML leave will be extended through the earlier of:

- a. the date in which all sick leave will be exhausted; or
- b. expiration of six (6) months of accumulated leave, measured from the date in which leave was first granted for the same condition.
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All sick leave is forfeited upon separation from employment, except as provided in O-6, or as provided in (Idaho State Code 53-4001) rights to reinstate sick leave upon return to work for any State of Idaho agency. [ed. 2-08]

PO-5. Sick and all other available paid leave must be used concurrently with and taken first before any period on unpaid leave during EFML. EFML is leave with benefits but without pay, unless accrued sick or annual leave or compensatory time is used.

PO-6. An employee with a sick leave balance who separates from employment upon the expiration of EFML and qualifies as a disabled retiree, or as a retiree eligible for any tier of university retiree medical coverage that requires retiree cost sharing, may convert a predetermined amount of the unused sick leave to pay for the retiree’s share of the cost for their own university medical coverage. [FSH 3730]

PO-7. Health benefits will continue during an approved EFML in the same manner afforded to any employee of the same classification who is actively at work.

  a. The employee must make arrangements to self-pay his/her share of employee and dependent benefit costs during any portion of EFML that is unpaid.
  b. Sick leave, annual leave, holiday pay and credited service hours toward vesting of annual leave accruals and retirement are not continued during any portion of leave that is unpaid.
  c. Short and/or long-term disability wage replacement payments and/or actively at work provisions for death and other benefits provisions within PERSI and similar contracts refers to an employee being actively at work (employed and not on leave) on the date in which the disability has first begun. An employee whose condition began before taking a leave of absence and who has qualified or met the conditions in accordance with provisions set by the carrier will continue to receive benefits and/or remain eligible for such benefits during Extended Family Medical Leave, and/or upon separation from employment if unable to return to work. [Refer to Disability and Retirement Plan Handbooks www.hr.uidaho.edu/benefits]

PO-8. Employees who have been granted EFML are required to provide documentation to support progressive medical improvement. Medical certification and other documentation may include temporary restrictions of duties and/or periods of part-time work. However, restrictions of job duties and/or part-time work restrictions must be approved by Human Resources and the hiring authority, and must intend and attempt to phase an employee back to work to a level of full assumption of job duties, with or without reasonable accommodation.

PO-9. During EFML, the university may require reasonable periodic re-certification and updates regarding the employee’s medical condition, prognosis for improvement, and fitness for duty. A release to return-to-work from the health care provider is required before an employee may return to work. The university, at its own expense, may require medical pre-screening for return to work in a position that includes pre-employment medical pre-screening to ensure the safety and fitness for prescribed job duties before an employee is allowed to return to work with or without restriction of job duty.

PO-10. When an employee’s own medical condition or restriction is expected to be chronic, or when the condition fails to progressively improve, notice of contemplated action and job separation or accommodation of disability under ADA should be explored.

PO-11. If at the expiration of the EFML period the employee is still unable to perform the essential duties of his/her position with or without reasonable accommodation, the university has the right to separate any employee from employment and/or to end EFML.
and begin job separation when the medical prognosis ceases to support a return to work within EFML limits. [FSH 3910, 3920 and 3930]

QP. LEAVE FOR PROFESSIONAL IMPROVEMENT. [ren. 2-08]

QP-1. Leave for professional improvement is paid leave with benefits for the purpose of participating in professional development programs or experiences for an extended period of more than two (2) weeks to attain or enhance a skill set that will result in a mutual benefit to both the university and the employee.

QP-2. Members of the faculty who hold the rank of instructor or above, exempt employees, and classified staff are encouraged to participate in programs of professional improvement. (Tenured faculty may also be eligible for sabbatical leave and should refer to FSH 3720.) Generally, on the recommendation of an applicant’s administrative supervisor, and with the approval of the dean/director and the provost/vice president, professional improvement leave may be granted under the following conditions (individual departments may have additional requirements and restrictions):

a. To participate in this plan, the faculty or staff member must have completed four (4) years of service before the time the leave is to begin.

b. Generally, at least two (2) years of service must intervene between a sabbatical leave and a leave for professional improvement or at least five (5) years of service must intervene between a leave for professional improvement and a subsequent request for the same type of leave.

QP-3. The employee requests professional improvement leave with pay by submitting a letter of application to the supervisor at least three (3) months before the leave is to begin. The letter should address the professional development to be derived from the leave, what activities (i.e. research, writing, experience, etc.) will be involved to achieve the professional goals, the duration of the leave, the level of support requested, and the source of funds, if known.

QP-4. Persons granted leave under this policy are expected either to return to the active service of the university for at least one academic or other full work year after completion of the leave, or are required to repay the money received from the university for the period of professional improvement leave granted.

QP-5. The employee must submit a report to the supervisor, the dean/director, and the provost/president regarding his or her developmental experience upon return to active work status.

QP-6. The employee may request approval to use accrued annual leave and to have an equal amount of administrative leave with pay granted to permit his or her participation in a program of professional improvement.

RQ. EXCEPTIONS. [ren. 2-08]

RQ-1. Exceptions to these policies may be considered to the extent that such an exception is not contrary to state and federal laws, the Board of Regent policies and procedures, and are considered in the best interest of the university. The respective unit administrator, the AVP for Human Resources or designee, and the president or designee as required, can grant exceptions. A request for exception must be submitted and approved by the supervisor and forwarded to the AVP for Human Resources for further consideration of all approvals.
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)
[3/09]

Administrative Procedures Manual [APM] □ Addition X Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title: Employee Leave Benefits 55.09/Shared Leave
Appl./Donation 55.07

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Don Crowley, Faculty Secretary 3/10/15
(Please see FSH 1460 C)
Telephone & Email: crowley@uidaho.edu

Policy Sponsor: (If different than originator.)
Name Date
Telephone & Email:

Reviewed by General Counsel ___Yes X__No Name & Date: ___________________

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

Faculty Affairs Committee (FAC) members reviewed proposed changes to FSH 3710, APM 55.07 & 55.09 sent from Human Resources Oct. 2014. FAC’s focus was on leave associated with childbirth/adoption/foster care placement in FSH 3710. FAC requested the Faculty Secretary’s Office review APM 55.07 & 55.09 in relation to FAC’s proposed parenting changes. Faculty Secretary Office and HR met and reviewed both APMs. Changes are to clear up differences between APM and FSH and ensure current processes are addressed. E.g. 1) Shared Leave Committee no longer exists and has not met for many years. Rarely is shared leave denied and FSH 3710 provides an appeal process if denied, so reference is made to FSH 3710; 2) entire sections for military leave duplicated in FSH 3710 was removed from 55.09.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

FSH 3710.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: __________________________
Track # ____________
Date Rec.: ____________
Posted: t-sheet ______
web___________
Register:  ______________

Policy Coordinator
Appr. & Date: ______________
[Office Use Only]

FSH
Appr. ____________
FC ____________
GFM ____________
Pres./Prov. ____________
[Office Use Only]

APM
F&A Appr.: ____________
[Office Use Only]

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55.07 -- Shared Leave Application/Donation Procedures

July 21, 2009 January 2, 2014 (formerly 50.07)

A. General. The UI Shared Leave Program allows employees to donate annual leave hours into a general shared leave pool or directly to fellow employees suffering their own, a relative's or a household member's extraordinary or severe illness, injury, impairment, or physical or mental condition which has caused or is likely to cause the employee to take Personal Leave (leave without pay, FSH 3710 O) or to terminate employment. Employee donations fund the program so that income may continue for other employees who are experiencing a difficult period in their lives. Employees have the opportunity to target their donations to a specific co-worker or they may make their donations to the general pool. See FSH 3710 for shared leave eligibility and requirements.

B. Process. Shared Leave is an employee-administered program. Employees who wish to donate annual leave and employees who wish to apply to receive shared leave submit requests on the appropriate forms to Human Resources (HR). Applications are reviewed by HR Benefit Services staff for completeness, see also FSH 3710 L, then forwarded to the Shared Leave Committee where they are reviewed and acted upon pursuant to the Shared Leave Policy [See FSH 3710]. The Shared Leave Committee includes two faculty members appointed by the Faculty Affairs Committee and two staff members appointed by the Staff Affairs Committee. The Director of Human Resources (or designee from HR) serves as chair, without vote. Academic year faculty, who do not accrue annual leave, are eligible to receive Shared Leave the same as other board-appointed employees.

C. Procedure. A board appointed employee must have used all other leave balances such as sick leave, annual leave and compensatory time to qualify as a recipient of Shared Leave. The employee may not be receiving other employer provided benefits that supply income such as disability or worker's compensation.

D. Eligibility. See FSH 3710 K-2.

GB-1. Application to Receive Shared Leave. To be eligible to receive Shared Leave hours, an employee (or his or her designated representative) must submit an Application to Receive Shared Leave form [See Sample Form] and certification from a licensed health care provider that describes the illness, injury, impairment or physical or mental condition. Forms need to be returned to Human Resources no later than the first Monday of a pay period to be
considered for Shared Leave during that pay period. Forms are available from Human Resources. Exceptions to the deadline will be considered by Benefit Services staff the committee in very extenuating circumstances.

**BC-2. Donating Annual Leave.** UI board appointed employees (see FSH 3710 A-6) who accrue annual leave may donate a minimum of eight hours of annual leave to another UI employee who is eligible to receive Shared Leave, or they may donate leave to the Shared Leave Pool (see FSH 3710 L). Shared Leave donors must complete a Donation of Annual Leave Hours form [See Sample Form].

i) A Shared Leave donation may not cause the donor’s annual leave balance to fall below 40 hours at the time the donation is processed, unless the donor is terminating active employment from the University. If a donor is within 8 hours of reaching his or her maximum annual leave accrual, the minimum donation is 16 hours. Annual leave donations and uses may not exceed 80 hours per pay period.

**CB-3. Shared Leave Conversion Rate.** Hours of contributed donated shared leave are multiplied by the donor’s hourly rate and placed in the Shared Leave pool. Shared Leave is awarded in hours. Leave is withdrawn from the pool as hours, reconverted by multiplying the hours awarded times the recipient’s hourly rate and subtracted from the

i) Shared leave that is awarded but not used by the intended recipient will be returned to the Shared Leave Pool. It is not returned to the donor(s):

   i) Donation conversion. Hours of donated shared leave are multiplied by the hourly rate of the donor; that amount is recorded as a deposit to the shared leave pool or the directed recipient’s account and subtracted as hours from the donor’s annual leave balance.

   ii) Recipients conversion. The recipient’s hours of shared leave need is multiplied by the recipient’s hourly rate and subtracted from the shared leave pool.

   iii) Donors may donate annual leave regardless of their salary funding source.
CB-4. Recording Shared Leave Donations and Uses. Human Resources adjusts leave balances in the Banner HRIS to reflect Shared Leave donations and enters Electronic Personnel Action Forms (EPAF) for Shared Leave uses. No departmental action is needed to reduce annual leave or to transfer an employee to Shared Leave. [ed. 7-10]

DC. Information. Application to donate and receive Shared Leave are available from Human Resources. For further information or questions on the Shared Leave Program, call HR (208) 885-31003609 or [See FSH-3710-KFSH 3710-L].
55.09 -- Employee Leave Benefits
July 21, 2009 (formerly 50.06)

NOTICE: This section is currently in review due to recent approved changes to Faculty-Staff Handbook 3710. Should any conflicts arise between these two, the governing policy is FSH 3710.

A. General. The following leave benefits are available to board appointed UI employees, if eligible: Annual (vacation) leave, sick leave, parental leave, military leave, jury or other legal duty leave, leave for campaigning for or serving in public office, sabbatical leave, leave for professional improvement, leave without pay, administrative leave, shared leave, and family and medical leave. Benefits for specific leave types available are fully described in FSH 3710. [See 55.07, 55.38, and FSH 3710, 3020-3720 and 6230] [ed. 7-09]

B. Process. Annual (vacation) and compensatory leave is generally to be taken at times mutually agreeable between the employee and the supervisor. Sick leave, family medical leave, military leave, servicemember family medical leave, parenting, jury leave, and shared leave accommodate the personal needs and responsibilities of the employee outside the work environment and require communication with, but not necessarily approval of, the employee’s supervisor and Human Resources (HR), see FSH 3710 for the various leave types.

Employees are placed on leave when serving in the Legislature. Requests to take leave when campaigning for or serving in public office, or when elected to part-time municipal or county offices, are considered on an individual basis [See FSH 6230]. Sabbatical leave, leave for professional improvement, and administrative leave require prior application and approval of the University. The Shared Leave program is an employee-sponsored program; applications for shared leave are submitted to Benefit Services and approved in accordance with policy guidelines (see APM 55.07).

C. Procedure.

C-1. Annual (Vacation) Leave. Employees should submit requests for annual leave, as far in advance of the time leave will be taken as possible this allows the unit sufficient time to cover the employee’s absence is practicable. Longer advance notice is generally expected when leave is desired for more than a week. Annual leave is subject to the approval of the supervisor, such approval not to be unreasonably withheld. Employees whose salaries are funded by grants or contracts are expected to use all annual leave earned while paid from the grant or contract before expiration of the grant or contract or termination of employment. Employees are expected to take all annual leave prior to converting from fiscal year to academic year appointments. [See FSH 3710].
C-2. **Sick Leave.** Sick leave (FSH 3710 C) is taken when the employee is unable to work because of illness and/or, to a limited extent, when it is necessary for the employee to provide care for a member of the immediate family, or in the event of death of a family member, or on a limited basis for parent-child bonding. When sick leave is exhausted, other leave may be required to be used first before taking personal leave (see FSH 3710 O). However, if on approved FMLA (12 weeks) and parenting leave (16 weeks) a combination of leave may be used, see C-3 below and FSH 3710 M-2 and E-2 and E-3, the department timekeeper will charge further leave to annual leave or place the employee on leave without pay (LWOP) and the employee may apply for shared leave (APM 55.07) if the LWOP is due to illness or injury of the employee or an immediate family member [See FSH 3710].

C-3. **Parental Leave.** Parental leave is allowable under the Family and Medical Leave Act (FML) and may be, if the employee is eligible, a combination of accrued leave, sick leave, shared leave, annual leave, accrued overtime (if available) and/or leave without pay may be used. The employee should consult in advance with the supervisor and with Benefit Services. Job and benefit protection available under FML is not afforded until acceptable documentation has been provided and the employee is so advised in writing. [See FSH 3710].

C-4. **Military Leave.** The employee should present a copy of his or her military orders to their supervisor. The department timekeeper processes the request for military leave on an Electronic Personnel Action Form (EPAF) and provides a copy of the military orders to Benefit Services as documentation. The departmental timekeeper then enters the number of hours as "MIL" on the timesheet/PHAHOUR. Military leave with pay is limited to 15 working days, 120 hours per calendar year [See FSH 3710]. If more than 120 hours per calendar year of military leave are needed, the employee may elect to use eligible paid time off and/or they will be placed on leave without pay for the duration of the military leave [See 55.38]. [ed. 7-09]

1) **Health Benefits During Military Leave.** The UI will continue the employee health care coverage for up to 30 days of service at the normal cost to the employee. Employees going onto military leave may extend their UI paid medical/dental coverage by electing to use annual leave and/or compensatory time (if available) prior to moving onto leave without pay (LWOP) with benefits status. Dependent coverage may also be extended for as long as the employee remains on paid status. The department timekeeper will process the unused 15 days of military leave first, then may exhaust any compensatory time, followed by any annual leave if the employee elects to use it. After this initial UI paid period, an employee on military leave may elect to continue

**Commented [TA1]:** i) through iv) covered in FSH 3710 F-2,3&4

**Commented [TA2]:** FSH 3710 F-2

**Commented [TA3]:** FSH 3710 F-3

**Commented [TA4]:** In FSH 3710 F-2 they can continue dependents if they pay the costs. This sentence suggests they can only continue dependents as long as on paid status.
enrollment in the university group health plan for an additional six months, provided the employee or his/her designee pays both the employee and employer share of the premiums for each month of coverage.

ii) Life Insurance Benefits During Military Leave. Employees on military leave may elect to continue participation in the University basic life insurance program for a maximum period of six months. Life insurance and disability benefits will not be payable for a loss resulting directly or indirectly, wholly or partly, from participation in a military organization or from war or act of war. Employees also may elect to continue self-paying the premiums to keep the dependent life coverage in effect for up to 6 months, by paying the premium by the first of each month in Benefit Services. Employees also have the right to convert these policies to individual policies if they do not return to active UI status within six months from the date they are ordered to active duty. If an employee chooses not to continue the above insurance plans, then when the employee returns to active UI employment status his or her insurance will be reinstated as if there had been no break in service or coverage. Employees with questions should contact the Benefits Services in HR at (208) 885-3697.

iii) Reemployment Upon Completion of Military Duty. In accordance with state and federal law, employees upon their return will be reinstated to their former positions or a comparable position without loss of seniority, status or pay rate provided the employee returns with an honorable discharge and within five years from departure date. In some situations, reemployment may not be possible, such as when there has been a significant change in circumstances, if reemployment would impose an undue hardship on the university or department, or if the person’s employment was temporary in nature. Employees returning from military leave must provide the university timely notification of their intent to return to their position. The university may require documentation that the person’s application for reemployment is timely and that the person’s discharge from uniformed service was under honorable conditions. UI procedures will follow the Uniformed Services Employment & Reemployment Rights Act (USERRA), 38 U.S.C. §§ 4301-4333, enforced by Department of Labor’s Veterans’ Employment & Training Service (VETS). Details may be found at www.dol.gov/vets.

iv) Retirement Plan Benefits While on Military Leave Retirement benefit contributions are suspended while the employee is on MLWOP status. Upon reemployment after military leave, re-enrollment in the retirement plan will be immediate. For purposes of retirement benefits, employees shall be treated as not having incurred a break in service by reason of their absence for military leave. If an employee so chooses, s/he can retroactively make the employee contributions to the retirement plan for the unpaid military time and will have three times the period of
C-5. Leave for Jury or Other Legal Duty. The employee should inform his or her supervisor, and provide a copy of the legal document requiring the employee’s presence for jury or other legal duty to HRPayroll. Departments Employees process a leave of absence with pay for the required period by entering the code “JRY” on the timesheet PHAHOUR. The employee is entitled to keep fees and mileage reimbursement in addition to regular salary [See FSH 3710].

C-6. Leave for Campaigning for or Serving in Public Office. [See FSH 3710, 6620, also RGPP2 Board of Education Policy]. If leave for campaigning or for serving in public office involves personal leave without pay: [See 55.38]. [ed. 7-09]

C-7. Sabbatical Leave. [See FSH 3720] If the sabbatical leave involves a reduction in appointment percentage—for example, a full year sabbatical at half pay: [See 55.38]. [ed. 7-09]

C-8. Professional Improvement Leave. [See FSH 3710] [ed. 2-08]

C-9. Personal Leave (leave without pay). Employees who have exhausted family medical leave or parenting leave (see FSH 3710 M & E) and are unable to work due to illness or disability, and/or when absent from work and all available leave (sick, and/or annual, compensatory or shared) leave is exhausted or, in some rare situations, at the request of the employee, may be eligible for Personal Leave Without Pay. [See FSH 3710 O]. Personal Leave Without Pay impacts other benefits [See 55.38] thus. Employees contemplating a period of Personal Leave Without Pay need to make application, see “forms” or “leave” at www.hr.uidaho.edu/benefits or contact Benefit Services (208) 885-3697. [ed. 7-09]

C-10. Administrative Leave. [See FSH 3710] [ed. 2-08]

C-11. Shared Leave. Forms for donating and receiving shared leave are available on the Benefits website, www.hr.uidaho.edu/benefits, see “forms” within the appropriate section under “time away from work”. [Also see 55.07 and FSH 3710]. [ed. 7-09]

C-12. Family Medical Leave. FML is leave without pay with continuation of group health insurance benefits. See FSH 3710 M for requirements of using accrued sick and other leave unless the employee has accrued sick leave. Upon request the employee may additionally use annual leave, or accrued overtime compensatory time.
and is eligible for holiday pay that occurs during an approved leave period. Job and benefit protection available under FML is not afforded until acceptable documentation has been provided and the employee is so advised in writing. Leave request and medical certification forms are available on Benefit Services website at www.hr.uidaho.edu/benefits; see “forms” within the appropriate section under or “leavetime away from work”. [See FSH 3710]. If family and medical leave involves leave without pay: [See 55.38]. [ed. 7-09]

D. Information. All leave benefits are discussed weekly at Employee Benefits Orientation [See 55.31]. For further information or questions on leave benefits, call Benefit Services at (208) 885-3697. [ed. 7-09]

Commented [TA9]: Covered in FSH 3710 under ‘D. Holiday’ and ‘M. FML’.
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH]  □ Addition  □ Revision*  □ Deletion*
□ Emergency Minor Amendment  □
Chapter & Title:  FSH 3780 – Dependent Educational Tuition Reduction-Change

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s):  Kattlyn Wolf  4/7/2015
(Please see FSH 1460 C) Name Date
Telephone & Email:  kwolf@uidaho.edu

Policy Sponsor:  (If different than originator.)
Name Date
Telephone & Email:

Reviewed by General Counsel  _ ____  Name & Date: __________________

I.  Policy/Procedure Statement:  Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

To promote employee recruitment and retention, and improve culture and climate at the university, by means of expanding dependent tuition benefit to 100% and adding multiple dependents.

II.  Fiscal Impact:  What fiscal impact, if any, will this addition, revision, or deletion have?

See attached documentation.

III.  Related Policies/Procedures:  Describe other policies or procedures existing that are related or similar to this proposed change.

IV.  Effective Date:  This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to:_____________________________________

Track # _______________  Date Rec.: _____________  Posted: t-sheet ______  h/c ___________
web___________  Register:  ______________  (Office Use Only)

Policy Coordinator  Appr. & Date:  [Office Use Only]

FSH
Appr. ____________  FC ____________  GFM ____________  Pres./Prov. ____________
[Office Use Only]

APM  F&A Appr.:  ____________
[Office Use Only]
Preamble: This policy was created in 2012 with employee recruitment and retention purposes in mind as well as improving the culture and climate at the University.

A. General: The dependent educational tuition and fee reduction benefit (benefit) is a 50% reduction in residential (in-state) student tuition and fees for dependents of eligible employees enrolled in University of Idaho undergraduate or graduate academic credit courses. No other fees are waived by this benefit; for example, the benefit does not include additional fees associated with specific courses (e.g., web-based courses), specific academic programs (e.g., professional fees), or specific services (e.g., insurance or student activities). 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. There is no limitation on the number of credits that may be taken per semester.

B. Employee: A board-appointed University employee on regular appointment who works at least half-time (including those on official leave) is eligible for the dependent educational tuition reduction benefit. A dependent may receive the benefit if the employee is eligible on the first day of the academic term. Only a single dependent per household at a time is eligible for this benefit.

C. Dependent: A dependent of a University employee is eligible as defined by the Federal income tax code, Section 152. The University reserves the right to request copies of tax returns or other supporting documentation.

C-1. An eligible dependent:
(a) must be an admitted student who has met all normal academic requirements for the course(s) taken;
(b) may receive only one 50% dependent educational tuition and fee reduction per semester, and may use the tuition and fee reduction benefit for a maximum of eight semesters (applies to both full and part time students);
(c) of an employee whose employment terminates due to death or permanent disability shall continue to be eligible for this program until the dependent meets one of the below, whichever comes first:
   • completes a degree
   • reaches the maximum number of eight semesters

D. Application: Applications require approvals/signatures of the employee, the dependent, and Human Resources. Applications must be filed before tuition is paid for the semester in which the benefit will be applied. The benefit is not automatically renewed; it must be applied for each semester. Fraudulent certification of dependent eligibility by an employee is grounds for discharge and the employee shall be required to repay all costs associated with the benefit.

E. Termination: 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 academic work must be terminated unless the applicable tuition is paid, except in the case where employment is terminated due to death or permanent disability.
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

[3/09]

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion* □ Emergency

Minor Amendment ☑

Chapter & Title:  FSH 1565 – E-4 Emeritus

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): (Please see FSH 1460 C)  

(If different than originator.)  

Policy Sponsor: Brant Miller, IT Chair, 2014-15  

Telephone & Email: 5-4077 & bgmiller@uidaho.edu  

Reviewed by General Counsel ___Yes ____No  Name & Date: __________________

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

The minor amendment to FSH 1565 E-4, letter “n” is a result of an inquiry made by 2014-15 Senate Leadership regarding the privileges of emeriti faculty when it comes to software. After consulting with ITS, specifically Dan Ewart, Brian Cox and Ben Kirchmeier, it was determined that software privileges are extended to emeriti faculty for University/institutional software licenses. Non-University/institutional software licenses for emeriti faculty are at the discretion of emeriti home departments.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

The immediate impact is negligible given the current software vendor contracts. Future fiscal impacts are unknown and dependent upon future software contracts.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: __________________________________________

Policy Coordinator  

Appr. & Date:  

[Office Use Only]

APM  

F&A Appr.:  

[Office Use Only]

FSH  

Appr. __________  
FC __________  
GFM __________  
Pres./Prov. __________  
[Office Use Only]

Track # __________
Date Rec.: __________
Posted: __________
   t-sheet __________
   h/c __________
   web __________
Register: __________
(Office Use Only)
PREAMBLE: This section defines the various academic ranks, both faculty and non-faculty (e.g. graduate student appointees and postdoctoral fellows), and their responsibilities. Subsections A, C, D, E, F, and I should be read in conjunction with the policy and procedures concerning granting of tenure and promotions in rank which are contained in 3520 and 3560 (subsection I only in conjunction with 3560). Most of the material assembled in this section was a part of the original 1979 Handbook. The material in section I was added July, 1987. The definitions of ‘postdoctoral fellow’ (J-5), ‘graduate assistant’ (K-3) and ‘research fellow’ (K-4) were revised in July 1996. Section J-1, voting rights for lecturers, was changed in July 2001. Section A was substantially revised in July 1994, so as to underline better the importance of both teaching and scholarship. At that time the so-called “Voxman Amendment” (the addition of ‘in the classroom and laboratory’ to the list of possible venues wherein the evaluation of scholarship might take place) made its first appearance. Section A underwent additional substantial revision in July 1998 and July 2006, always with the hope of creating greater clarity in a complex subject. Extensive revisions along those same lines were made to B (entirely new and in 2008 B was moved to 3570), C, D, and E, in July 1998. Further, less extensive revisions were made to C-1, D-1, and E-1 in July 2000. In July 2008, this section was reorganized to better reflect classifications as stated in FSH 1520 Article II, no substantive changes were made to policy. In 2009 changes to the faculty position description and evaluation forms integrating faculty interdisciplinary activities into the evaluation processes were incorporated into this policy as of January 2010. Ranks for Associated Faculty in F were removed because the promotion process as detailed in 3560 for faculty ranks was deemed excessive for associated faculty. Those currently holding a specific rank in adjunct or affiliate will retain that privilege. In July 2010 the affiliate and adjunct terms were switched to conform to national norms and rank of Distinguished Professor was added. In July 2011 voting for associated faculty was clarified and Clinical Faculty under “G. Temporary Faculty” moved to “D. University Faculty” as D-9 and was revised. In July 2012 edits were made to the Distinguished Professor under D-8 and to the qualifications for Emeritus status and a search waiver under E. In July 2013 definitions for research and teaching assistants were more clearly defined. In January 2014 the time necessary to qualify for Emeritus status was redefined and in July 2014 the cap on non-tenure track faculty appointments in a unit was adjusted and promotion processes clarified and revised. Further information may be obtained from the Provost’s Office (208-885-6448).

A. Introduction
B. Definitions
C. Responsibility Areas
D. University Faculty
E. Emeriti
F. Associated Faculty
G. Temporary Faculty
H. Non-Faculty
I. Qualification of Non-faculty Members for Teaching UI Courses

Changes are to E-4only.

E. EMERITI. (FSH 1520 II-2)

E-1. ELIGIBILITY. A board appointed, benefit-eligible member of the university faculty who holds one of the ranks described in 1565 D and who leaves the university and has a minimum of 8 years of service, has attained 55 years of age, and attained the rule of 65 (age plus years of service is at least 65), is designated as “professor emeritus/emerita,”
“research professor emeritus/emerita,” or “extension professor emeritus/emerita,” as applicable. A faculty member without such rank has the designation “emeritus” or “emerita,” as applicable, added to the administrative or service title held at the time of retirement. [ed. 7-00, 7-02, 1-08, rev. 7-12, 1-14]

In exceptional circumstances the provost, with the concurrence of Senate Chair, Vice Chair and Faculty Secretary, may suspend the above eligibility rules and award or deny emeritus status to a faculty member. [add. 1-12]

E-2. RIGHTS, PRIVILEGES, AND RESPONSIBILITIES. Emeriti are faculty members in every respect, except for the change in salary and in certain fringe benefits, the obligation to perform duties, and the right to vote in faculty meetings. They continue to have access to research, library, and other UI facilities. Emeriti may take an active role in the service and committee functions of their department, college, and the university. UI encourages the voluntary continued participation of emeriti in the activities of the academic community.

E-3. EMPLOYMENT OPPORTUNITIES. [add. 1-12]

a. Emeritus faculty may hold a part-time position at the University of Idaho after retirement, but not a full-time one. When it is in the university’s interest, exceptions may be made and the full-time employment limitation may be waived by the president. [ed. 1-14]

b. Units wanting to employ emeritus faculty without a search must request, in writing, a search waiver from the Director of Human Rights, Access & Inclusion.

c. Search waivers granted to emeritus faculty remain in effect for three full years. Units need only notify Human Resources if they want to continue to employ an emeritus faculty member while the search waiver is in effect. However, a unit is not obligated to employ the emeritus faculty member during this three year period.

E-4. SPECIFIC PROVISIONS FOR EMERITUS PARTICIPATION. [ren. 7-12]

a. Departmental mail boxes continue to be available to emeriti who reside locally.

b. A list of emeriti and their mailing addresses is maintained at each level--department, college, and university (Human Resources). [ed. 7-06, 1-08]

c. The director of human resources is responsible for supplying information about emeriti for the Campus Directory.

d. Emeriti who have campus mail boxes receive University of Idaho publications by campus mail or upon request by email. [ed. 7-12]

e. Emeriti who have departmental mail boxes receive full distribution of notices; otherwise, special requests may be made to the departmental administrator.

f. Ordinary office materials and supplies are available under the same issuing procedures applicable to other members of the department.

g. Departmental postage may be used for professional mail.

h. Offices for emeriti are provided on a space-available basis.

i. One, free non-transferable gold parking permit each year. [rev. 1-08]

j. Any discounts available to other members of the faculty and staff through various UI agencies are available to emeriti.

k. Emeriti are included in appropriate university, college, and departmental faculty-staff functions.

l. In the appointment of committees, administrators at all levels and the Committee on Committees consider the availability and desire for significant service of emeriti.

m. There are many areas of activity, professional and other, such as service to the community and special groups within the community and university, in which emeriti may have the time and the inclination to make continuing contributions (e.g., guest lectures, research design, and consultation). In connection with such services, emeriti are not excluded from the travel budget, though they may generally have a lower priority.
n. E-mail accounts are available to emeriti without charge.  [add. 7-99, ren. 1-08, ed. 7-12]

n. Emeriti who elect to maintain an active computing account will retain access to services provided by Information Technology Services (ITS) including electronic communications (e.g. – email, instant messaging, etc.), technical support, and offered software.

E-5. LISTING OF EMERITI IN THE COMMENCEMENT PROGRAM. Names of faculty members who retire after meeting the eligibility requirements stated in E-1 are listed in the program of the commencement exercises held during the fiscal year in which their UI duties end; also, those whose service obligations are to end on or before August 31 following a given commencement will be listed in the program for that commencement.  [ed. 1-10, ren. 7-12]

E-6. MAINTENANCE OF TIES WITH EMERITI. The Faculty Senate has urged UI units periodically to review their contacts with emeriti and to take steps to ensure that the provisions of this section–particularly b and c, above–are being carried out; moreover, the senate has urged all members of the UI community to seek additional ways of maintaining ties with emeriti and to provide opportunities and the means for them to continue to be a part of, and of service to, the university. [ed. 1-08, 7-09, ren. 7-12]

No further changes from here on.
POLICY COVER SHEET

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment ✓

Chapter & Title: FSH 3730 – C-2 b Honored Staff Retiree Privileges

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Faculty Senate, 2012-13, April 23, 2013
(If different than originator.)

Policy Sponsor: Brant Miller, IT Chair, 2014-15

Telephone & Email:

Reviewed by General Counsel ___Yes ___No Name & Date: __________________

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

The minor amendment to FSH 3730 – C-2 mirrors that of FSH 1565 E-4 “n” is a result of an inquiry made by 2014-15 Senate Leadership regarding the privileges of honored staff retirees when it comes to software. After consulting with ITS, specifically Dan Ewart, Brian Cox and Ben Kirchmeier, it was determined that software privileges are extended to emeriti faculty and honored staff retirees for University/institutional software licenses. Non-University/institutional software licenses for emeriti faculty are at the discretion of emeriti home departments.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

The immediate impact is negligible given the current software vendor contracts. Future fiscal impacts are unknown and dependent upon future software contracts.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ____________________________

Policy Coordinator
Appr. & Date:

APM
F&A Appr.: __________ [Office Use Only]

FSH
Appr. __________
FC __________
GFM __________
Pres./Prov. __________

Track # __________
Date Rec.: __________
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h/c ______
web ______
Register: ______

University of Idaho
University Faculty Meeting #3 - 2014-15 - May 5, 2015 - Page 62
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

[Faculty/Staff Handbook [FSH] ☐ Addition ☐ Revision* ☐ Deletion* ☐ Emergency Minor Amendment XX

Chapter & Title: Retirement Privileges and Programs 3730

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Brandi Terwilliger 3-23-15
(See FSH 1460 C)
Telephone & Email: 885-3008 brandit@uidaho.edu

Policy Sponsor: Greg Walters 3-23-15 – Reviewed and Approved
Telephone & Email: 885-3478 gregwalters@uidaho.edu

Reviewed by General Counsel _X_ Yes _No Name & Date: Kent Nelson – 3-23-15

I. **Policy/Procedure Statement:** Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

Updates were needed to clarify eligibility in retirement programs due to changes in enrollment requirements due to Health Care Reform. Without the changes, many employees could potentially lose eligibility for retiree health coverage under the University plans. Other changes were needed to update contact information and provide further clarity.

II. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?

No negative fiscal impact on the University.

III. **Related Policies/Procedures:** Describe other policies or procedures existing that are related or similar to this proposed change.

None

IV. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ______________________________________

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Policy Coordinator

Appr. & Date:

[Office Use Only]

FSH

Appr. FC GFM Pres./Prov.

[Office Use Only]

APM

F&A Appr.

[Office Use Only]

Track # Date Rec.:

Posted: t-sheet h/c web

Register: ______________

(Office Use Only)
PREAMBLE. This section was an original part of the 1979 Handbook, was changed in July of 1994 to add the optional retirement plan, and most recently changes were made in 2007 to the eligibility criteria and benefits available through the University of Idaho. This January 2008 version updates and supersedes all prior versions.

The benefits and programs described in this section are governed by applicable laws and plan documents and are subject to change at any time. In the event of a conflict between this policy and the applicable law or plan document, the law or plan document will control. Employees contemplating retirement should make an appointment with a Benefit Services Specialist to verify eligibility and discuss benefits and options for retirement.

Further information regarding retirement is available from Human Resources, Benefit Services www.hr.uidaho.edu/benefits www.uidaho.edu/benefits (208-885-3697). [ed. 7-97, 7-02, 9-06, 12-06, rev. 7-07]

CONTENTS:
A. Introduction
B. State and Federal Retirement Plans
C. University of Idaho Privileges and Programs
D. Disability Retirement
E. Surviving Spouse and Children

A. INTRODUCTION. This policy describes the retirement privileges and programs available to eligible University of Idaho employees upon retirement. The University of Idaho through its Board of Regents reserves the right to change, amend or discontinue any part of the programs described within or any one or all of these programs in part or entirely at any time, to the extent allowed by law. This policy should not in any way be construed as a guarantee of continued employment.

A-1. State and Federal Retirement Plans. These include state and federal retirement plans such as the Public Employees Retirement System of Idaho (PERSI), the Idaho Optional Retirement Plan (IORP), the Civil Service Retirement System and the Federal Employees Retirement System. Eligibility criteria and benefits are determined under each plan and can be found in the respective plan documents, which are subject to change. In the event of a conflict between this policy and the plan documents, the plan documents control in all respects.

A-2. University of Idaho Retirement Privileges and Programs. These include faculty emeritus and honored staff retiree privileges, eligibility to participate in retiree health programs of the University of Idaho (Retiree Health Program).

A-2-a. Emeritus Faculty and Honored Staff Retiree Privileges. This policy sets forth the eligibility criteria for, and benefits of, honored staff retiree privileges. For faculty emeritus privileges, see FSH 1565 H. Emeritus or honored staff retiree status does not automatically confer eligibility for the Retiree Health Program.

A-2-b. Retiree Health Program. This policy sets forth eligibility criteria for the Retiree Health Program. Information regarding specific benefits is contained in the applicable plan documents and may change. In the event of a conflict between the information in the Plan documents and those presented in this policy, the plan documents will control.
B. STATE AND FEDERAL RETIREMENT PLANS. University of Idaho employees participate in the following plans, depending on eligibility. Employee contributions are made to PERSI, IORP, the Civil Service Retirement System and the Federal Employees Retirement System through payroll deduction. The University of Idaho contributes a portion of salary and the employee contributes a portion of salary. These amounts vary from year to year. Current contribution rates are available at http://www.hr.uidaho.edu/benefits under the “Rate Retirement” menu option. Contributions are suspended while an employee is on leave without pay, except that IORP contributions may be continued by the plan during a qualified disability if a waiver is requested and approved.

B-1. Public Employees Retirement System of Idaho (PERSI). PERSI is a defined benefit retirement plan. Eligibility requirements and benefits are governed by the PERSI plan document, which is available at www.persi.idaho.gov. Employees also may contact the plan administrator at the following address, internet site or telephone number listed below. The contact information can be found on the benefits website:

PERSI
Public Employee Retirement System of Idaho
P.O. Box 83720
Boise, Idaho 83720-0078
(208) 334-3365 or (800) 451-8228
www.persi.idaho.gov

B-2. Idaho Optional Retirement Plan (IORP). IORP is a defined contribution retirement plan. There are two plan administrator choices for employees: Teachers’ Insurance Annuity Association/Consolidated Retirement Equities Fund (TIAA/CREF), and Variable Annuity Life Insurance Corporation (AIG-VALIC), each of which offers many different investment options. Eligible employees must enroll and select a Plan administrator and self-directed investments when they become eligible. In the event that a Plan administrator and/or investment options are not elected by the employee before contributions begin, default elections and/or investments will be selected. Employee and employer contributions will be directed to the default Plan administrator and deposited within default investment choices, unless or until these have been changed by the employee. Eligibility requirements and benefits are governed by the IORP plan document. For more information, contact the plan administrator listed below. The contact information for each can be found on the benefits website at the following web address or telephone number:

TIAA-CREF: www.tiaa-cref.org 1-800-842-2776
AIG-VALIC: www.aigvalic.com 1-800-892-5558 448-2542

B-3. Federal Retirement Plans. The Civil Service Retirement System and the Federal Employees Retirement System are defined benefit plans available to certain University of Idaho employees working within the Cooperative Extension System. Eligibility requirements and benefits are governed by the federal government plan document and applicable federal regulations. For complete information, go to www.opm.gov/retire. If you need assistance, contact Benefit Services at the University of Idaho.

C. UNIVERSITY OF IDAHO RETIREMENT PRIVILEGES AND PROGRAMS.

C-1. Definitions.
C-1-a. Retirement. An employee may bring about the termination of his or her employment by resigning [see 3930 A and 3940]. Resignation is considered to be "retirement" if the employee has qualified for certain benefits based on age and length of qualified service (defined below).

C-1-b. Retiree. A retiree is a former employee who has terminated his or her employment through retirement.

C-1-c. Qualified Service. For purposes of determining retiree health program eligibility, qualified service includes service while employed at the University of Idaho in a position eligible for University of Idaho health benefits (not excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not otherwise eligible under the University’s separate criteria for University subsidized health benefits. Service to the University of Idaho will be counted if the employee has been on paid status at half time or greater. Employees on regular academic year appointments receive credit for twelve (12) months of service, provided all other requirements of qualified service are met. Service while employed on a temporary hourly (TH) basis will not be recognized as qualified service. Qualified service performed prior to a break in service is permanently forfeited, except as provided in C-1-e.

C-1-d. Active Health Plan Enrollment. For purposes of determining eligibility for the Retiree Health Program, years of active health Plan enrollment will be counted for each fiscal Plan year in which the employee has been enrolled as the primary subscriber for dental, life and disability benefits, or each year of employment in a position eligible for University of Idaho health benefits (not excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not otherwise eligible under the University’s separate criteria for University subsidized health benefits.

C-1-e. Break in Service. A break in service occurs when there is a separation from qualified service for one day or more. For purposes of this policy, after a break in service an employee forfeits all prior qualified service, unless the employee had at least five (5) years of continuous qualified service prior to the break in service. A break in service does not include the following: (1) periods of any category of approved paid or unpaid leave of absence; or (2) periods during which the employee is eligible for and has opted to remain on the lay-off roster.

C-1-f. Part-time Employees. Qualified part-time employees who are employed in a health benefits eligible position are eligible for the Retiree Health Program upon retirement (not excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. Service credit for part-time employees will be earned based on a prorated percentage of their full-time status. An employee who temporarily reduces his or her hours of work and remains employed in a health benefits eligible position may earn up to two (2) years of full-time service credit if hours have been temporarily reduced to accommodate transitioning into retirement or to accommodate a family or personal matter. In either case, the employee must obtain written approval in advance from his or her supervisor and Benefit Services.

C-1-g. Effective Date of Retirement. The effective date of retirement shall coincide with the last work day in a calendar month or last work day of a fiscal year. The last day of employment is generally the last day worked [see FSH 3710 B-4].
C-2. Honored Staff Retiree Privileges

C-2-a. Eligibility Requirements. Upon retirement, each member of the classified or exempt staff whose service to the University of Idaho meets one of the following criteria, and whose employment was not terminated for cause, is designated an honored staff retiree:

i. Completion of 30 years of qualified service; or
ii. Completion of 15 years of qualified service and attainment of age 64; or
iii. Attainment of age 55 and completion of a number of years of qualified service, such that the sum of the years of age and the years of service is 80.

C-2-b. Privileges. Each member of the classified or exempt staff meeting the above eligibility requirements is awarded a presidential commendation for long and faithful service, and his or her name is entered on the list of honored staff retirees especially worthy of continued recognition as members of the University of Idaho community. Privileges available to honored staff retirees are as follows:

i. Membership in the University of Idaho Retirees Association (UIRA);
ii. Education privileges [see FSH 3740];
iii. One, free non-transferable gold parking permit each year;
iv. Listing in the campus directory;
v. Honored staff retirees who elect to maintain an active computing account will retain access to services provided by Information Technology Services (ITS) including electronic communications (e.g. – email, instant messaging, etc.), technical support, and offered software. Email accounts are available without charge within the local dialing area;
vi. Eligibility to receive mailings (upon request), such as the University of Idaho Register and similar publications; and
vii. Inclusion in appropriate university, college, and departmental functions.

C-3. Privileges for Emeritus Faculty Retirees. Privileges for emeritus faculty retirees are enumerated in FSH 1565 H-3E-4.

C-4. Retiree Health Program Eligibility. The Retiree Health Program is divided into four tiers of eligibility requirements and includes varying levels of benefits. Benefits offered in each tier are subject to change.

C-4-a. Tier I -- Eligibility Criteria. To qualify for Tier I, an employee must be retired and covered under the Retiree Health Program pursuant to a prior version of this policy, or meet the following criteria on or before September 30, 2007, but may retire later:

i. Hired on or before January 1, 2002; and
ii. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (5) five years immediately prior to retirement; and
iii. Meets one of the following three criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; or
   2. The sum of the number of years of age and qualified service is equal to or greater than 80, to include a minimum age of 55 years; or
   3. Has completed at least 15 years of qualified service and attained a minimum age of at least 64 years.
C-4-b. Tier II -- Eligibility Criteria. To qualify for Tier II, an employee must meet the following criteria on or before June 30, 2011, but may retire later:
  i. Hired on or before January 1, 2002; and
  ii. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (15) fifteen years immediately prior to retirement; and
  iii. Meets one of the following criteria:
      1. Has completed at least 30 years of qualified service, regardless of age; or
      2. The sum of the number of years of age, subject to a minimum age of 55 years; plus qualified service, subject to a minimum of 15 years, is equal to or greater than 80.

C-4-c. Tier III -- Eligibility Criteria. To qualify for Tier III, an employee must meet the following criteria on or after July 1, 2011, but may retire later:
  i. Hired on or before January 1, 2002; and
  ii. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (20) twenty years immediately prior to retirement; and
  iii. Meets one of the following criteria:
      1. Has completed at least 30 years of qualified service, regardless of age; or
      2. Has completed at least 20 years of qualified service, and the sum of the number of years of age, subject to a minimum age of 55 years, plus years of qualified service is equal to or greater than 90.

C-4-d. Tier IV -- Eligibility Criteria. To qualify for Tier IV, an employee must meet the following criteria:
  i. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (10) ten years immediately prior to retirement; and
  ii. Has completed at least 10 years of qualified service; and
  iii. Is at least 55 years of age, except that a person with a disability may qualify regardless of age.

C-5. Continued Eligibility for the Retiree Health Program. Once a Retiree has qualified for the University of Idaho Retiree Health Program, the following conditions must be met for continued eligibility.

C-5-a. Retirees and their dependents must enroll in the Retiree Health Program when first eligible or they will lose eligibility. Upon eligibility for the Program, retirees will be required to make a one-time, irrevocable election of available plan options. Current retirees must make this election no later than July 1, 2007. Retirees, who are enrolled in the Program; but fail to make a election will be automatically and irrevocably enrolled in the selected default Plan. Plan options and default plans may vary from year to year. Information regarding plan options and which plans will be used for default is available from Benefit Services.

C-5-b. Retirees are first eligible on the date following the effective date of retirement.

C-5-c. Covered dependents are first eligible on the same date the retiree becomes eligible or on the date they later become a dependent.

Commented [TB(3)]: These individuals would elect 30 month COBRA as they would have likely exhausted all sick leave. It is a richer benefit to continue the Active plan through COBRA vs. Retiree Plan.
C-5-d. All participants, including covered dependents, in any tier of the Retiree Health Program must elect Medicare Parts A and B as their primary payer of benefits when they first become eligible, except to the extent that federal law requires the Retiree Health Program to be primary. All participants must comply with rules set forth in the Plan document for each Plan and/or tier of eligibility with respect to Medicare Prescription Drug Coverage (Part D).

C-5-e. All participants, including covered dependents, in any tier are subject to coordination of benefits rules as set forth in the applicable plan documents.

C-5-f. If coverage under the Retiree Health Program is ended for any reason, there is no opportunity to rejoin the Program at a later date. The only exception is for a Retiree who returns to a benefit eligible position at the University of Idaho following his or her participation in the Retiree Health Program. In this instance, Retiree Health Program coverage will be temporarily suspended. After active employment ends, the Retiree will have the right of reinstatement in the same tier and Plan election(s) that applied on the original date of retirement.

C-6. Benefits. Programs offered vary from tier to tier and benefits vary within the Plans available within each tier, as set forth in the applicable plan document(s). These are subject to change without notice. Such benefits include medical coverage, and may include, but are not limited to, vision or hearing benefits, mental health coverage, access to the University of Idaho wellness or disease management programs, dental benefits, life insurance, and/or prescription drug coverage.

C-7. Contributions. Effective July 1, 2007, all retirees will share in the cost of coverage through a monthly contribution, unless a Plan option which requires no monthly contribution is elected (if applicable).

The University will offer at least one medical Plan option to Tier I retirees which does not require retiree cost sharing through monthly contributions. It is the intention of the University to offer at least one medical Plan option that is less costly, or that for tiers two and three may have no retiree cost sharing. The Plan with no cost or less retiree monthly cost sharing will have less generous benefits such as higher deductibles and higher out of pocket expenses.

C-7-a. Retirees: Effective July 1, 2007, retiree cost sharing will begin for retirees in Tier I at a rate of $30.00 per month for non-Medicare eligible retirees and $20.00 per month for Medicare eligible retirees; or with no required retiree contribution if the Plan option with less generous benefits (i.e.; higher deductibles and other out of pocket expenses) is elected.

Rates are subject to increase annually. Limits on the amount of increase apply only to Tier I retirees and shall not exceed:

(1) the percentage increase of the total cost of the Retiree Health and Life Insurance Programs; or (2) ten percent (10%) of the previous year’s premium paid by that retiree, whichever is less.

All future retirees will make contributions based on the rate in effect for their respective tier and Plan election at the time of retirement.

C-7-b. Tier IV Retirees: Except for retirees who qualify as a retiree with a disability and are not yet eligible for Medicare, Tier IV retirees will be responsible for 100
percent of the cost of retiree coverage. Retirees with a disability in Tier IV pay a subsidized rate until Medicare eligibility.

**C-7-c. Sick Leave Conversion:** One half of the unused sick leave hours available at the time of retirement accrued since July 1, 1976, not to exceed a benefit of 600 hours, may be used to pay for the cost of Tier IV retiree health coverage, or to pay for the retiree with a disability share of cost in Tiers I, II, and III.

**EXAMPLE #1:** At the time of retirement, Retiree has accrued 1000 hours of sick leave. Retiree may convert 500 hours to pay for retiree medical coverage.

**EXAMPLE #2:** At the time of retirement, Retiree has accrued 1400 hours of sick leave. Retiree may convert 600 hours to pay for retiree health coverage.

Only Retirees in Tier IV and retirees with a disability in any tier of coverage who separated from employment due to disability and who had a sick leave balance eligible for sick leave conversion as described above are eligible for sick leave conversion. Sick leave conversion may not be used to pay for ported life insurance, voluntary dental, Medicare or any other voluntary benefit, or to cover the cost of coverage for dependents.

**C-7-d. Dependents:** Retirees in all tiers will be responsible for payment of one hundred percent of the cost of coverage for all covered dependents.

**C-7-e. Payment:** The cost (if applicable) of retiree and/or dependent coverage must be paid in a timely manner. All plans of coverage (medical, dental, etc., if applicable) will be terminated if the required payment for all plans of coverage is not received within 30 days of the date it is due.

**D. DISABILITY RETIREMENT**

**D-1. State and Federal Retirement Plans.** An employee who becomes permanently disabled may be able to receive income benefits from his or her retirement plan, or to receive continued contributions to his or her retirement plan at no cost. The respective plan documents govern in all respects. For information regarding disability retirement and plan benefits, contact the applicable plan administrator. Contact information can be found on the benefits website:

- PERSI: [www.persi.idaho.gov](http://www.persi.idaho.gov) 1-800-451-8228
- TIAA-CREF: [www.tiaa-cref.org](http://www.tiaa-cref.org) 1-800-842-2776
- AIG-VALIC: [www.aigvalic.com](http://www.aigvalic.com) 1-800-892-5558
- Federal Plans: [www.opm.gov/retire](http://www.opm.gov/retire) (contact Benefit Services for assistance)

**D-2. University of Idaho Retiree Health Program for Employees with a Disability.**

**D-2-a. Eligibility.** An employee qualifies for participation in the Retiree Health Program as a retiree with a disability if he or she meets the following criteria:

i. Qualifies for disability retirement or retirement contribution replacement benefits during disability under the employee’s state or federal retirement plan or under the disability insurance plan in effect at the time of the disability, regardless of age; and

ii. Is enrolled as the primary subscriber under the University of Idaho active employee medical plan at the time of disability and has been so enrolled for at least ten (10) years.
D-2-b. Other Conditions.

i. A retiree with a disability must apply for Medicare disability benefits upon entry into the Retiree Health Program.

ii. The retiree with a disability and all covered dependents must elect Medicare Parts A and B as their primary payer of benefits when they first become eligible, except to the extent that federal law requires the Retiree Health Program to be primary.

iii. If a retiree with a disability qualifies for any tier of coverage under the Retiree Health Program that provides a more generous or less costly benefit, enrollment in that tier will take precedence.

iv. Retirees with a disability and covered dependents are subject to coordination of benefits rules as set forth in the applicable plan documents.

E. Surviving Spouse and Children.

E-1. Faculty Emeritus or Honored Staff Retiree Privileges. There is no transfer of Emeritus or Honored Staff privileges as described above or in FSH 1565 E-4H.

E-2. Retiree Health Program. A covered dependent spouse or child may continue under the Retiree Health Program under the following terms and conditions:

E-2-a. Following the death of the retiree, a covered dependent spouse or child may continue coverage under the Retiree Health Program, provided all other Program and plan eligibility requirements are met.

E-2-b. Effective July 1, 2007, a covered dependent spouse of a deceased retiree may remain enrolled in the Retiree Health Program even if he or she later remarries, provided all other Program and plan requirements are met.

E-2-c. A new spouse of a former covered dependent spouse, or any other newly acquired dependent, may not be added to the Retiree Health Program. However, a dependent child of the retiree who is born after the death of the retiree may be added within 30 days of birth.

E-2-d. The covered dependent spouse or eldest covered dependent child will become the new “primary subscriber” in the same Plan election and tier of coverage that applied prior to the retiree’s death, provided all other Program and plan eligibility requirements continue to be met. However, regardless of which tier applies, the new primary subscriber will be responsible for the entire cost of coverage based on the full subscriber rate for himself or herself and for all covered dependents, based on the subscriber and dependent rates in effect at that time.

E-2-e. If the covered dependent spouse or eldest child does not have the same Medicare eligibility as the retiree had at the time of death, the surviving covered dependent(s) will be transferred to the retiree plan that is consistent with the new primary subscriber’s own Medicare eligibility.

E-2-f. If a covered dependent spouse or child becomes eligible for coverage under another employer’s health plan as either the primary subscriber or as a dependent, eligibility for coverage under the Retiree Health Program will end. Waiving coverage under another employer’s plan also will result in a loss of eligibility for the Retiree Health Program.
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □

Chapter & Title: FSH 2700 Student Evaluations

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Trish Hartzell, Chair, Teaching & Advising (Please see FSH 1460 C)

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Telephone & Email: 208 885-0572  Hartzell@uidaho.edu

Policy Sponsor: (If different than originator.)

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Telephone & Email: ____________________________

Reviewed by General Counsel _ _Yes _X___No Name & Date: ______________________

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

This is a revision of the student evaluation form that has been updated to ensure that it is useful for both classroom and on-line classes, provides feedback on use of technology in teaching, and lets the student provide course/instructor feedback as it relates to learning.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have? None

Institutional testing and assessment will redesign the website.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

None

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ________________________________

Policy Coordinator Appr. & Date: ____________________________

[Office Use Only]

APM F&A Appr.: ____________________________

[Office Use Only]

FSH

Appr. ______________

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Pres./Prov. ______________

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(Office Use Only)
STUDENT FEEDBACK ON AN ACADEMIC COURSE AND LEARNING ENVIRONMENT


1. How often did you attend class?  Less than 60%  60%+  70%+  80% + 90%+

2. How many hours per week (outside of class) did you do work for this course?  
   [<2  2+  4+  6+  8+ ]

3. The instructor expressed clear expectations for learning outcomes in this course.  
   [SD – D – N - A - SA]

4. Did you attempt to take advantage of available help outside the course by meeting in person or otherwise communicating (via email or through BbLearn) with the instructor?  
   [N – Y]
   If YES - This communication was helpful.  [SD – D – N - A - SA]
   If NO – comment: text input box

5. What were some positive aspects of the course that supported learning?  
   Comment: text input box

6. What aspects and/or content of the course could be improved to better support learning?  
   Comment: text input box

7. Overall, the content presented in this course contributed to your understanding of this subject.  
   [SD – D – N - A - SA]

8. Overall, the delivery of information and organization contributed to your understanding of the course material.  
   [SD – D – N - A - SA]

9. Additional comments?  
   Comment: text input box
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions.)

Faculty/Staff Handbook [FSH] □ Addition ☒ Revision* □ Deletion*
□ Emergency Minor Amendment □

Chapter & Title: FSH 1620 University Level Committees

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Don Crowley, Faculty Secretary (Please see FSH 1460 C)

Telephone & Email: crowley@uidaho.edu

Policy Sponsor: (If different than originator.)

Telephone & Email:

Reviewed by General Counsel ___Yes ____No Name & Date: ___________

I. Policy/Procedure Statement: Briefly explain the purpose of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

With major changes to committees and new committees being formed in the last few years, plus comments/concerns expressed regarding faculty’s inability to weigh in on some of the major committee changes, it is deemed best that any major changes go forward to the general faculty to ensure faculty governance.

II. Reason/Rationale: Reason this addition, revision, and/or deletion is necessary, if different than above?

III. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

IV. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

V. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ________________________

Track # ____________ Date Rec.: __________

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Policy Coordinator Appr. & Date: ____________

FSH Appr. ____________ FC ____________ GFM ____________ Pres./Prov. ____________

APM F&A Appr.: ____________

Track # ____________ Date Rec.: __________

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Office Use Only

Page 1 of 1
PREAMBLE: This section outlines the regulations governing university-level committees (Part B). It also includes a section on guidelines for committee chairs (Part C). In 2007 this section was substantially revised to reflect current process, in 2008 minor changes were made to B-2, 13 and C-13, and in 2010 Faculty Council was changed to Faculty Senate and B-7 was revised to address chair appointments. For further information, contact the Office of the Faculty Secretary (208-885-6151).

CONTENTS:
A. Function, Structure, and Membership of Committees
B. Regulations Governing Committees
C. Guidelines for Committee Chairs

A. FUNCTION, STRUCTURE, AND MEMBERSHIP OF COMMITTEES. See 1640 for the function and structure of each university-level standing committee. The list of members appointed to serve on these committees is published on the Faculty Senate website at http://www.webs.uidaho.edu/facultycouncil/ under the UI Committees link after the beginning of the academic year by the Committee on Committees, and copies of the booklet can be downloaded and printed from the website. [rev. 1-07, ed. 7-10]

B. REGULATIONS GOVERNING COMMITTEES. The following is a codification of the general regulations governing committees:

B-1. As used here, “committee” is a general term denoting any standing or special committee, subcommittee, council, board, senate or similar body. [ed. 7-10]

B-2. The establishment, discontinuance, or restructuring of, and the assignment of responsibilities to, standing committees of the university faculty are policy actions that require approval by the Faculty Senate only. [rev. 1-07, 7-08, ed. 7-10]

B-3. Ad hoc committees to advise the president and university-level standing committees that are composed primarily of administrators (e.g., Publications Board) are appointed by the president.

B-4. The Committee on Committees appoints, subject to confirmation by the Faculty Senate, members of standing committees of the university faculty. The chair of Faculty Senate establishes special Faculty Senate committees and appoints their members. [ed. 7-10]

No further changes to remainder of this policy.
### POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

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| Chapter & Title: FSH 1640.36 & 43 Dismissals Hearing & Faculty Appeals |
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*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

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**Originator(s):**

Don Crowley,   2/20/15  
Name  Date

**Telephone & Email:**  
885-6151  crowley@uidaho.edu

---

**Policy Sponsor:**

Committee on Committees  2/25/15  
Name  Date

**Telephone & Email:**  
Randy Teal, Chair

---

**Reviewed by General Counsel:**

Yes  No  Name & Date:  
Yes  No

---

**I. Policy/Procedure Statement:**

Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

To address concerns brought forward about process and who may attend hearings.

---

**II. Fiscal Impact:**

What fiscal impact, if any, will this addition, revision, or deletion have?

No impact anticipated

---

**III. Related Policies/Procedures:**

Describe other policies or procedures existing that are related or similar to this proposed change.

---

**IV. Effective Date:**

This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ______________________________________

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**Policy Coordinator**

Appr. & Date:  
[Office Use Only]

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**APM**

F&A Appr.:  
[Office Use Only]
1640.36  
DISMISSAL HEARINGS COMMITTEES  
(This section was removed from FSH 3910 D-3.b. and placed here in July 2008)

A. FUNCTION. This committee will conduct a hearing at the request of a faculty member who has been terminated to determine whether their termination was properly based on the grounds stated (see FSH 3910 D-3 and 3920 D.)

B. STRUCTURE AND MEMBERSHIP: The DHC is composed of four faculty members and one administrator at the departmental level or above, six faculty members and three administrators as alternates. Committee members, including alternates, are chosen on the basis of their objectivity and competence and the high regard in which they are held in the UI community. In appointing members the Committee on Committees should attempt to reflect the diversity of the UI faculty. Due to the possibility a case may be appealed to the Faculty Appeals Hearing Board care should be taken in appointing members to both Faculty Appeals Hearing Board and Dismissal Hearings Committee. The term of membership is three years. [rev. 1-09, 4-11]

C. SELECTION: The faculty member requesting a hearing has the right to substitute up to two members appointed with two others from the alternate list. The provost also has the right to substitute two members appointed with two others from the alternate list. If as a result of substitutions and conflicts of interest there are an insufficient number of faculty members or administrators on the alternate list, the Committee on Committees will be asked to appoint more members to the alternate list as needed. Once the panel for an individual hearing has been determined, it will meet at the direction of the chair of the Dismissal Hearings Committee and elect its own panel chair. [rev. 1-09]

C-1. Panel Chair’s Role: Once a panel chair has been selected, he/she will request a meeting with the Faculty Secretary at their earliest opportunity to discuss and review process. The panel chair may request assistance from the Faculty Secretary, Ombuds or General Counsel’s office throughout the hearing.

C-2. Observers: Both parties may have an advisor or counsel at the hearing.

1640.43  
FACULTY APPEALS HEARING BOARD  
(This section was removed from FSH 3840 C & D and placed here in July 2008)

A. FUNCTION. This board will conduct a hearing at the request of a faculty member who wishes to appeal an institutional decision under FSH 3840 A. In each case referred to it, the board has the following responsibilities: [ed. 4-12]

A-1. To review all documentary evidence submitted by the parties prior to the hearing and all evidence submitted by the parties at the hearing. The board may require the parties to submit evidence deemed relevant by the board.

A-2. To determine whether there has been any (1) failure to comply with prescribed procedures, (2) application of inappropriate considerations, (3) abuse of discretion, or (4) abuse of the appellant’s academic rights and privileges.

A-3. To make recommendations to the president.

B. STRUCTURE AND MEMBERSHIP: Five faculty members, one of whom is a departmental administrator, are principal members. In addition, five other faculty members, two other departmental administrators, and three off-campus faculty members are appointed as alternate members of the board. In appointing members, including alternates, the Committee on Committees must ensure that the majority of the members are tenured and each of them have
been employed at the UI for longer than two years. Since a case for dismissal is appealable to the Faculty Appeals Hearing Board, care should be taken in appointing members to both Faculty Appeals Hearing Board and Dismissal Hearings Committee. The term of membership is three years, with initial terms staggered to form a rotation pattern. The off-campus alternates will serve, in place of principal faculty members chosen by lot, when an appeal by an off-campus faculty member is to be heard. The other alternate members will serve, as appropriate, when a principal member is deemed to have a conflict of interest. Once the panel for an individual hearing has been determined, it will meet at the direction of the chair of the Faculty Appeals Hearing Board and elect its own panel chair. [rev. 7-99, 1-09, 4-11]

### B-1. Panel Chair’s Role:
Once a panel chair has been selected, he/she will request a meeting with the Faculty Secretary at their earliest opportunity to discuss and review process. The panel chair may request assistance from the Faculty Secretary, Ombuds, or General Counsel’s office throughout the hearing.

### B-2. Observers:
Both parties may have an advisor or counsel at the hearing.

### C. SPECIAL CONSIDERATION:
Faculty members serving on the Faculty Appeals Hearing Board (FAHB) should take careful note of the following additional considerations and conditions for service:

1) appeals usually occur following tenure, promotion, and salary decisions in the middle of the Spring semester,
2) appeal hearings usually require a 2-4 hour time block which will require meeting on a weekday evening or Saturday to accommodate the schedules of all of the parties involved in a hearing,
3) the term of office of a member of the FAHB ends when the last active case final report is submitted. Faculty members not willing to abide by these conditions should not apply for service on the Faculty Appeals Hearing Board, and
3840

PROCEDURES FOR FACULTY APPEALS

PREAMBLE: This section deals with the procedures for faculty appeals. It formed a part of the 1979 Handbook and was revised in July of 1994 to add harassment on the basis of race, color, religion, gender, national origin, age or disability to the “areas of concern” and in January of 1996 so as to remove the Faculty Affairs Committee from those bodies through which an appeal had to travel before being heard. The section was substantially revised in July 1999 and again in July 2002 to clarify the committee’s scope and its procedures, and was revised in 2007 to add a process for addressing retaliation complaints. In 2008 the committee composition previously in C and D was moved into FSH 1640 Committee Directory. In April 2014 changes were made to align this policy with Board policy. Further information is available from the Provost’s Office (208-885-6448) or the Office of the Faculty Secretary (208-885-6151). [rev. 7-99, 7-02, 7-07, 7-08, 4-14, ed. 7-00, 7-05]

CONTENTS:
A. Areas of Concern
B. Procedures for Initiating an Appeal
C. Faculty Appeals Hearing Board
D. Hearing Procedures
E. Procedures Following the Hearing

A. AREAS OF CONCERN. The procedures provided in this policy are to be used by faculty members to appeal administrative decisions, including without limitation decisions in such matters as denial of tenure, denial of promotion, position description, performance evaluation, salary determination, and to challenge the contents of personnel files. Applicability of these procedures to some matters is subject to certain limitations and exclusions - nonrenewal of fixed-term appointments [see 3900 E and F], dismissal for cause [see 3910, in particular, 3910 D-5-c], and layoff resulting from a declaration of financial exigency [see 3970]. Allegations of sexual harassment or discrimination based on race, color, sex, national origin, religion, age, sexual orientation, or disability are not subject to this policy, but should be brought to the Director of Human Rights, Access and Inclusion. Decisions of the president concerning administrative assignments are not appealable under this policy. A faculty member alleging retaliation is required to follow the process set forth in FSH 3810 before proceeding under this policy. The time period for appeal will begin to run upon completion of the process set forth in 3810. [rev. 7-99, 7-02, 7-07, 7-12, ed. 9-06, 6-09]

B. PROCEDURES FOR INITIATING AN APPEAL.

B-1. Before, or in addition to, filing an appeal, the faculty member should seek satisfaction informally by discussing his or her complaint with the administrator who made the decision. If the issue is not resolved by this means, the faculty member should then go to the next administrative level for redress. Reference to these discussions should be included in the request for a hearing.

B-2. A faculty member who wishes to appeal an institutional decision may do so by submitting a written request for a formal hearing. Such a request must be made within 30 calendar days after he or she receives written notice of the institutional decision, except that a 20-day period is allowed in cases of nonrenewal of fixed-term appointments [see 3900 F], a 14-day period is allowed in cases of denial of tenure or promotion, and a 15-day period is allowed in cases of dismissal for cause [see 3910 D-5-a]. If the appeal concerns salary determination, the 30-day period allowed for filing begins with receipt of notice of the dollar amount of salary assigned [see 3420 B-3, B-6]; the earlier assignment to a salary-increment category [see 3420 B-3] may be appealed by the informal means described in B-1 or may be...
included in the appeal after the salary amount has been fixed. In the request, the faculty member must state clearly what decision is being appealed and, briefly, the grounds on which the appeal is based. If the time deadlines contained in this provision or in any rules or procedures adopted by the Faculty Appeals Hearing Board are not complied with the appeal shall be dismissed unless the Faculty Appeals Hearing Board determines that an attempt at informal resolution through the Ombuds Office or extraordinary circumstances justified the delay. [rev. 7-99, 2-07, ed. 7-01, 7-02, ed. 3-14]

B-3. The request for a hearing is addressed to the chair of the Faculty Appeals Hearing Board (FAHB) (see FSH 1640.43). The FAHB chair will forward copies of the request to the provost, and other administrators concerned. The provost, or another administrator designated by the provost, will furnish the FAHB chair and the faculty member a written statement of the reasons for the administrative decision. [rev. and ren. 7-99, ed. 7-02]

B-4. A request for a hearing does not affect the effective date of the decision being appealed. [add. 7-02]

C. FACULTY APPEALS HEARING BOARD. (see FSH 1640.43)

D. HEARING PROCEDURES. [ren. 7-08]

D-1. The hearing board may adopt rules of procedure from time to time. In a particular case these rules may be altered by the Board in the interest of fairness. These rules are available on request from the chair of the board and the faculty secretary. [add. 7-99, ren. 7-08]

D-2. The board will meet before the hearing to consider the nature of the parties’ expected presentations, to make decisions about the procedure that will be followed in the hearing, and to set mutually acceptable dates for the hearing, including the time and duration of the presentations. The board communicates these decisions in writing to the parties and allows each of them five working days in which to respond. The chair of the board negotiates any disputed matters. [ed. and ren. 7-99, ren. 7-08]

D-3. The chair of the board summons the faculty member and the officer (or a representative of the body) whose decision is under appeal. The chair also summons other UI employees or students to appear on the request of either party or of the board itself, the summons must set a reasonable time and place to appear and must give due notice. Persons summoned have the obligation to respond as though summoned by the president. Either party may be assisted by counsel or an advisor of its choice in an advisory capacity only. Both parties are entitled to be present during the entire hearing. [rev. and ren. 7-99, ed. 7-02, ren. 7-08]

D-4. During the hearing, the faculty member's case will be presented first, in whatever manner he or she desires: e.g., through the testimony of witnesses, submission of documents, or oral statements. The board may then question the faculty member. The administration then presents its case, followed by questions from the board. The faculty member is given an opportunity to respond and to summarize his or her case. [ed. 7-97; ren. 7-99, ed. 7-02]

D-5. As a general rule, the board admits, rather than excludes, presentations that either party desires to make. The chair may rule against presentations that are clearly repetitive or irrelevant. [ren. 7-99]

D-6. The faculty member and the board should know of the existence and substance of all materials on which the administration has relied in making the decision being appealed [see
Section 3840: Procedures for Faculty Appeals

3040; there should be no means by which the substance of any charge, or other adverse information or allegation, can be kept secret from the faculty member. [ren. 7-99, ed. 7-02]

E. PROCEDURES FOLLOWING THE HEARING. [ren. 7-08]

E-1. The findings and recommendations of the hearing board are reported promptly in writing to the faculty member, his or her departmental administrator and dean, the provost, and the president. [rev. 7-99, ed. 7-02, ren. 7-08]

E-2. The president, following receipt of the report of the hearing board, has the responsibility of promptly responding in writing—and in any case within 45 days—to the faculty member, and the hearing board, and of providing a statement of the rationale for his or her decision. [rev. 7-99, ed. 7-02, ren. 7-08]

E-3. No Appeal to the Regents. The Regents have delegated authority for personnel matters to the president (RGPIIB2b), specifically stating that employee grievances are not appealable to the Board. (RGPIIM2)[add. 7-02, ren. 7-08, rev. 4-14]

E-4. The chair of the board shall report annually to the Faculty Senate regarding the nature of the matters considered by the board during the preceding year. [add. 7-99, ren. 7-02, 7-08, 6-09]
DISMISSAL AND DISCIPLINE OF FACULTY

PREAMBLE: This section outlines procedures for the dismissal of tenured faculty and of untenured faculty who are being dismissed before the end of their current term of appointment. It was a part of the 1979 Handbook, though in that document it included exempt employees as well. It was thoroughly revised in July of 1989 to reflect changes in regents’ policy and divided into faculty and exempt sections in July of 1996. The whole of the policy was substantially revised, and sections E and F rewritten, in July 1999 so as to conform the university’s policy with that of the Regents. Non-tenured faculty should also consult section 3900 “Non-Reappointment of Non-Tenured Faculty and Exempt Staff.” Again, in compliance with Regents policy changes, this section was extensively revised in 2003. In 2008 the committee composition previously in D-3 b was moved into FSH 1640 Committee Directory. Further information may be obtained from the Provost’s Office (208-885-6448) or the Office of the Faculty Secretary (208-885-6151). [rev. 7-99, 7-03, ed. 7-08]

CONTENTS:
A. Regents’ Authority and Definition of Adequate Cause
B. Cause for Dismissal
C. Administrative Leave
D. UI Procedures Related to Dismissal
E. UI Procedures Related to Discipline Other Than Dismissal
F. Appeals to the Regents

A. REGENTS’ AUTHORITY AND DEFINITION OF ADEQUATE CAUSE.

A-1. All employees of the regents or of the agencies, institutions, school, or office under its jurisdiction are subject to dismissal for adequate cause during the period of employment. “Adequate cause” means one (1) or more acts or omissions which, singly or in the aggregate, have directly and substantially affected or impaired an employee’s performance of his or her professional or assigned duties or the best interests of the regents, institution, agency, school, or office. In addition, any conduct seriously prejudicial to the regents, an institution, agency, school or office may constitute adequate cause for discipline up to and including dismissal. Examples include harassment prohibited by law, immorality, criminality, dishonesty, unprofessional conduct, actions in violation of policies, directives, or orders of the regents, an institution, agency, school or office, unsatisfactory or inadequate performance of duties, or failure to perform duties. [RGP III3] [add. 7-99, rev. 7-03]

A-2. Dismissal of faculty is as provided in the regents’ policy RGP III. [add. 7-99, ed. 7-03]

B. CAUSE FOR DISMISSAL.

B-1. Dismissal (as opposed to non-renewal of a non-tenured faculty member) by UI of the employment of a faculty member, except in the case of resignation or retirement, will be only for adequate cause as defined above in A-1. [rev. 7-99, 7-03]

B-2. As provided in 3970, any faculty member may be laid off in conjunction with a reduction in force approved by the regents and resulting from a declaration of financial exigency.

C. ADMINISTRATIVE LEAVE. A faculty member may be placed on administrative leave with pay pending the procedures set forth in this section. [rev. 7-03]

D. UI PROCEDURES RELATED TO DISMISSAL. In each case, the issue of whether or not adequate cause for termination or dismissal exists is to be determined by an equitable procedure,
affording protection to the rights of the faculty member and to the interests of the state of Idaho and its system of higher education. The burden of proof that adequate cause exists rests with the institution and its administrative officers, and will be satisfied only by clear and convincing evidence in the record considered as a whole. [ed. 7-99, rev. 7-03]

D-1. Departmental, Division, and College Action. When reason arises to question the fitness of a faculty member, the immediate supervisory officer discusses the matter with the employee in a confidential personal conference. It is the duty of the immediate supervisor and the faculty member to make a good faith effort to correct any and all deficiencies in the faculty member’s performance. Departments, divisions, or colleges are to establish policies and procedures for identifying problems, suggesting remedial actions, and assisting the faculty member in becoming a productive member of the university community. These procedures are to include peer input and are to be fully integrated with the annual evaluation process. A good faith effort must be made to identify and resolve performance problems at the lowest administrative level.

   a. If remedial performance adjustments do not result, the provost shall determine whether formal dismissal proceedings should be initiated. [rev. 7-99]
   b. If the provost determines that formal proceedings should be initiated, he or she should formulate a written statement with reasonable particularity of the grounds proposed for the dismissal. [rev. and ren. 7-99]
   c. Nothing in these procedures prevents the provost from withdrawing the fitness complaint from the process, at any time for any reason. However, the provost must either withdraw the complaint or proceed with the dismissal process within a reasonable period of time. [rev. and ren. 7-99]
   d. The statement of particularity is communicated, in writing, to the faculty member by the provost and delivered personally or sent first-class mail, postage pre-paid to the employee at the last known address on file for the employee. [rev. and ren. 7-99, rev. 7-03]

D-3. Dismissal Hearings Committee Process. [ren. 7-99]  
   a. If the faculty member requests a hearing to determine whether the termination is properly based on the grounds stated, one will be conducted by a Dismissal Hearings Committee (DHC) at a specified time and place. See FSH 1640.36 for the function and structure of the DHC. The faculty member must file a written request with the provost for a hearing within seven working days of receipt of the provost’s communication of particulars. If the faculty member has not requested a hearing, the statement of particulars constitutes the dismissal recommendation, which the provost may communicate to the president without further delay. [rev. and ren. 7-99, 7-08]
   b. The DHC proceeds by considering the provost’s recommendation and statement of grounds for dismissal already formulated, the evidence supplied to support the dismissal recommendation, and the employee’s response written before the time of the hearing. If any facts are in dispute, the testimony of witnesses and other evidence concerning the matter set forth in the letter of particulars to the faculty member become part of the hearing record. [rev. and ren. 7-99, ren. 7-08]
   c. The DHC determines the order of proof, conducts the questioning of witnesses, and, if necessary, secures the presentation of evidence important to the case. [rev. and ren. 7-99, ren. 7-08]
   d. The faculty member has the option of assistance by counsel or an advisor; the faculty member, the provost, and their counsels/advisor have the right, within reasonable limits, to question all witnesses who testify orally. The faculty member has the opportunity to confront all adverse witnesses. All evidence is duly recorded. [rev. and ren. 7-99, ren. 7-08]
   e. If a question of timeliness arises during these procedures, the DHC will review the action of the delinquent party and determine whether the dismissal procedures will continue, as outlined above. [rev. and ren. 7-99, ren. 7-08]
f. The DHC reaches its decision in conference within five working days of the formal hearing’s close, solely on the basis of the record of the hearing. It makes explicit findings with respect to each of the grounds for removal presented or remedial actions, and renders a reasoned opinion. The provost, the president and faculty member are notified of the decision in writing and given a copy of the record of the hearing; the college and department or division concerned are notified of the recommendation. [rev. and ren. 7-99, 7-03, ren. 7-08]

D-4. Presidential Decision. [rev. and ren. 7-99, 7-03]

a. The president, after due consideration of the DHC’s recommendation, shall initially determine whether he or she agrees or disagrees with the DHC’s recommendation. In the event of disagreement, the president shall meet with the DHC to discuss the reasons for the president’s disagreement prior to reaching a final decision. Upon reaching a final decision the president forwards his or her decision to the faculty member and to the college and department or division. If the president’s decision differs from the committee’s, the reasons for the disagreement are also communicated to the faculty member, the college and department or division, and to the DHC. [rev. and ren. 7-99, rev. 7-03]

b. The notice from the president must be in writing and will be personally served on the employee or be sent by first-class mail postage pre-paid to the faculty member at the last known address on file for the faculty member. The notice must contain a concise statement of the charges against the employee, the findings of fact that are the basis for the president’s decision for dismissal or continuance, and any conditions imposed on the continuance of employment. If the president’s decision is for dismissal, the faculty member receives a statement of all rights and procedures for appeals of the president’s decision to the Faculty Appeals Hearing Board or directly to the regents. [rev. and ren. 7-99, rev. 7-03]

D-5. Appeal to the Faculty Appeals Hearing Board. The faculty member may appeal a presidential decision to dismiss to the Faculty Appeals Hearing Board (FAHB), see section 3840, or to the regents, see F below. [add. 7-99, rev. 7-03]

a. If the faculty member appeals to the FAHB he or she must notify the president in writing within fifteen (15) calendar days of the receipt of the notice given by the president. [add. 7-99, ed. 7-03]

b. If the charges against the employee, or the contentions of fact on which the charges are based, materially change after the determination of the DHC or appropriate appeals hearing body, the faculty member may obtain an additional review before the president makes a decision. Unless specifically provided by the regents in RGP IIM\ (see text below), discipline up to and including dismissal may be effective prior to the initiation by the employee of the internal grievance procedure. [ren. 7-99, rev. 7-03]

c. For the purpose of dismissal-for-cause procedures only, the FAHB hearing procedures have an expanded scope. Specifically, in accord with its current procedures, the FAHB may also hear and decide on the regularity and appropriateness of process, procedures, factual basis, and timeliness in the dismissal decision or the decision for continuance of employment, with the stated conditions. [ed. 7-99, rev. 7-03]

d. The president, after due consideration of the FAHB’s recommendation, shall initially determine whether he or she agrees or disagrees with the FAHB’s recommendation. In the event of disagreement, the president shall meet with the FAHB to discuss the reasons for the president’s disagreement prior to reaching a final decision. The president shall give substantial weight to the recommendation of the FAHB. If the president does not follow the recommendation of the FAHB, he or she shall send to the FAHB and to the appellant a written report of the basis for the president’s determination. [add. 7-99, ren. and rev. 7-03]

E. UI PROCEDURES RELATED TO DISCIPLINE OTHER THAN DISMISSAL. [add. 7-03]
E-1. The regents provide the following relative to discipline other than dismissal:

In each case the issue of whether or not adequate cause exists should be determined fairly by the institution, agency, school, or office recognizing and affording protection to the rights of the employee and to the interests of the Board and its institutions, agencies, school, or office.

a. Discipline, up to and including dismissal, of employees before the expiration of the stated period of appointment or employment contract will be only for adequate cause, as determined by the appropriate administrative officers to whom this responsibility is delegated by the chief executive officer of the institution. Each institution, agency, school or office shall have a process that provides employees with written notice of contemplated discipline and an opportunity to be heard. The employee may be placed on administrative leave with pay until he or she has exercised the opportunity to respond, or declined, either affirmatively or through inaction, to do so, and the recommendation has been acted upon by the chief executive officer or designee. The chief executive officer or designee must notify the employee of the recommendation and proceed in the following manner:

1) The notice must be in writing, and may be personally served upon the employee, or be sent by first-class mail, postage pre-paid, to the employee at the last known address on file for the employee.

2) The notice must contain a concise statement of the reasons and nature of the discipline.

E-2. UI Process. The provost has authority to determine if adequate cause has been established and if discipline other than dismissal should be taken. The provost may place the faculty member on administrative leave pending the final decision by the provost. Before final decision, the provost will provide the faculty member with a written statement setting forth with particularity the basis for the contemplated discipline and any information or material used to formulate the determination of adequate cause. The faculty member must be notified that he or she has fifteen (15) calendar days, or more in the discretion of the provost, in which to respond or decline to respond affirmatively or through inaction. After the period to respond expires the provost must notify the faculty member of his or her decision as required in the regents’ policy quoted above.

E-3. Following the imposition of discipline, the faculty member may use the FAHB (FSH 3840) to appeal the decision.

F. APPEALS TO THE REGENTS. Upon receipt of the final findings and recommendations, including those resulting from an internal grievance, a faculty member may file an appeal with the regents as set forth in RGP IIM (see below). The regents may if they choose to hear an appeal, by a majority of the total membership, approve, reject, or amend such findings, recommendations, or suggestions, if any, or may remand the matter for additional evidence, recommendations, or suggestions, if any. Reasons for suggestions will be stated in writing and communicated to the employee. The Board may employ a hearing officer for carrying out the Board’s duties under this paragraph. (RGP L4) [rev. 7-03, ed. 7-08]

RGP IIM provides: A nonclassified employee may elect to petition the Board to review any final personnel related decision of the chief executive officer. Any written petition must be filed in the Office of the State Board of Education within fifteen (15) calendar days after the employee receives written notice of final action under the internal procedures of the institution, agency, school, or office. The Board may agree to review the final action, setting out whatever procedure and conditions for review it deems appropriate, or it may choose not to review the final action. The fact that a written petition has been filed does not stay the effectiveness of the final decision nor does it grant a petition for review unless specifically provided by the Board. Board review is not a matter of right. An employee need not petition the Board for review in order to have exhausted administrative remedies for the purposes of judicial review. [rev. 7-03]
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency   □ Minor Amendment
Chapter & Title: FSH 1640.95 – University Security & Compliance Committee

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Matt Dorschel, Dec. 2014
(Please see FSH 1460 C)

Telephone & Email:
Policy Sponsor: (If different than originator.)

Reviewed by General Counsel ___ Yes _X__ No   Name & Date:

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

The Clery Center for Security on Campus recommends that institutions formally charter Clery Compliance committees to ensure full compliance with the Clery Act. The formation of such a committee at University of Idaho would both ensure Clery Act compliance and aid the University Office of Public Safety’s commitment to creating and maintaining a safe environment for the UI Community and those who visit. Establishing the Security and Compliance Committee would also help broaden awareness of security issues facing the University of Idaho and help enhance policies and programs that support a secure campus environment.

The Clery Center for Security on Campus is a nonprofit dedicated to preventing violence, substance abuse and other crimes on college and university campuses across the United States.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

   No impact anticipated

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to:

Policy Coordinator
Appr. & Date: ____________________________
[Office Use Only]

FSH
Appr. ____________________________
FC ____________________________
GFM ____________________________
Pres./Prov. ____________________________

APM
F&A Appr.: ____________________________
[Office Use Only]

Track # ____________________________
Date Rec.: ____________________________
Posted: t-sheet ____________
h/c ____________
web ____________
Register: ____________________________
(Office Use Only)
UNIVERSITY SECURITY AND COMPLIANCE COMMITTEE - Proposal

Background

The Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (20 USC § 1092(f)) is the landmark federal law, originally known as the Campus Security Act that requires colleges and universities across the United States to disclose information about crime on and around their campuses. The law is tied to an institution’s participation in federal student financial aid programs and it applies to most institutions of higher education both public and private. The Act is enforced by the United States Department of Education. Possible consequences for an institution’s non-compliance with the Clery Act include:

• A suspension or limiting of the institutions Title IV funding
• The Department of Education may issue a civil fine up to $38,500 per violation
• The institution may suffer reputational loss due to negative media attention
• Failure to comply with the Clery Act can be used in various litigation matters

Justification/Rationale for establishment of the University Security and Compliance Committee

The Clery Center for Security on Campus1 recommends that institutions formally charter Clery Compliance committees to ensure full compliance with the Clery Act. The formation of such a committee at University of Idaho would both ensure Clery Act compliance and aid the University Office of Public Safety’s commitment to creating and maintaining a safe environment for the UI Community and those who visit. Establishing the Security and Compliance Committee would also help broaden awareness of security issues facing the University of Idaho and help enhance policies and programs that support a secure campus environment.

Proposed Charter - FSH 1640.95

The University Security and Compliance Committee (USCC) is charged with ensuring the University’s compliance with the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (Clery Act), and planning and facilitating activities that support a safe and secure living, learning and working experience. USCC will focus on accurate disclosure (reporting of Clery crime statistics) and implementation of best practices regarding safety policies and procedures. The USCC will conduct an annual review of all reportable crimes prior to submitting crime statistics to the U.S. Department of Education. The committee will also perform a thorough review of the Annual Security and Fire Safety Report (ASFR) prior to its publication.

The USCC shall meet a minimum of three times each year. Topics will include, but not be limited to, the following:

• Review updates to the law, policies and procedures related to security and Clery Act compliance
• Ensure timely collection of Clery crime statistics from applicable jurisdictions

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1 The Clery Center for Security on Campus a nonprofit dedicated to preventing violence, substance abuse and other crimes on college and university campuses across the United States
• Recommend enhancements to security policies
• Identify programming efforts and recommend improvements.
• Review crime and disciplinary data to avoid report duplication.
• Conduct a final review of the data elements for the ASFR and recommend policy changes.
• Confirm procedures for distributing the ASFR.

**Proposed Membership**

Executive Director, Office of Public Safety & Security, Chair – Voting

Staff Affairs - Voting  
General Counsel - Non-Voting  
Dean of Students Office- Voting  
Moscow Police Department- Voting  
Two faculty members - Voting  
One non-Moscow representative (faculty/staff) - voting  
Title IX Coordinator - Voting  
EHS Fire Safety Specialist - Voting  
Two undergraduate students - voting  
Graduate Student - voting
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

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Originator(s): Rodney Frey 4 December 2014

Telephone & Email: 885-6268 rfrey@uidaho.edu

Policy Sponsor: Rick Fletcher (Chair UCGE) 4 December 2014

Telephone & Email: 885-6021 fletcher@uidaho.edu

Reviewed by General Counsel: Yes

I. **Policy/Procedure Statement:** Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

1. To acknowledge the additional function that UCGE has in reviewing and approving SBOE “GEM” transfer courses.
2. To establish the formation of the General Education Assessment Committee, a sub-committee of UCGE. Its function is to work with the Director of General Education and Assistant Director of Institutional Research and Assessment or designee, assisting in the implementation of general education assessment. This sub-committee annually reports assessment findings to UCGE.

II. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?

No impact anticipated

III. **Related Policies/Procedures:** Describe other policies or procedures existing that are related or similar to this proposed change.

IV. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to:

Policy Coordinator Appr. & Date:
[Office Use Only]

FSH Appr. ___________
FC ___________
GFM ___________
Pres./Prov. ___________
[Office Use Only]

APM F&A Appr.: ___________
[Office Use Only]

Track # ______________
Date Rec.: _____________
Posted: t-sheet ______ h/c ________
web ___________
Register: ___________
(Office Use Only)
A. FUNCTION.

A-1. University Committee for General Education serves as the curriculum body for general education by soliciting and approving proposals and courses to be included in the university's general education and general education courses eligible for transfer to other state institutions (SBOE General Education Matriculation "GEM" courses). The UCGE committee also engages in program review and makes recommendations for the continuous refinement of general education in conjunction with the Director of General Education and the Assistant Director of Institutional Research and Assessment (see General Education Assessment Committee, FSH 1640.90). Recommendations for change will be forwarded to UCC, Faculty Senate, and the university faculty. [rev. 4-11, rev. 11-12, rev. 12-14].

A-2. The committee reports periodically (at least once a year) to the Faculty Senate on the status of general education. [ed. 7-06, 7-09, ren. 4-11, ren. & rev. 11-12].

A-3. This committee traditionally meets on Thursdays at 3:30 p.m. [add. 7-08, ren. 4-11, 11-12].

[Information on University General Education can be accessed at the general education website: http://www.uidaho.edu/class/general-education [ed. 11-11, 11-12]]

B. STRUCTURE AND MEMBERSHIP. Eleven faculty members, one of whom serves as chair, selected by Committee on Committees as follows: two from the College of Letters, Arts, and Social Sciences, two from the College of Science, and one each from the colleges of Agricultural and Life Sciences, Art and Architecture, Business and Economics, Education, Engineering, Natural Resources and Library; two undergraduate students appointed by ASUI and chosen to represent two different colleges; and the following without vote: Director of General Education (w/o vote), College of Letters, Arts and Social Sciences Dean, or designee (w/o vote), College of Science Dean, or designee (w/o vote), Registrar, or designee (w/o vote), Assistant Director of Institutional Research and Assessment, or designee (w/o vote), Director of Academic Advising, or designee (w/o vote), and 11 faculty members selected by the Committee on Committees, one of whom serves as chair, and two undergraduate students, appointed by ASUI. The faculty members shall include one member from the Colleges of Agricultural and Life Sciences, Art and Architecture, Business and Economics, Education, Engineering, and Natural Resources and from the Library, and two members from the Colleges of Letters, Arts, and Social Sciences and Science. The student members shall also be chosen to represent two different colleges.
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

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<th>Faculty/Staff Handbook [FSH]</th>
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<tr>
<td>Chapter &amp; Title:</td>
<td>FSH 1640.XX UCGE Sub-committee</td>
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All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

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<tr>
<td>(Please see FSH 1460 C)</td>
<td>Rodney Frey</td>
<td>4 December 2014</td>
</tr>
<tr>
<td>Name &amp; Date:</td>
<td>885-6268</td>
<td><a href="mailto:rfrey@uidaho.edu">rfrey@uidaho.edu</a></td>
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<tr>
<th>Policy Sponsor:</th>
<th>Rick Fletcher (Chair UCGE)</th>
<th>4 December 2014</th>
</tr>
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<tr>
<td>Name &amp; Date:</td>
<td>885-6021</td>
<td><a href="mailto:fletcher@uidaho.edu">fletcher@uidaho.edu</a></td>
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<tr>
<th>Reviewed by General Counsel</th>
<th>Yes <em>X</em> No</th>
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I. **Policy/Procedure Statement:** Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

1. To establish the formation of the General Education Assessment Committee, a sub-committee of UCGE.
2. Its function is to work with the Director of General Education, assisting in the implementation of the general education assessment strategy, including norming and scoring of assessment artifacts.
3. The GEAC membership is primarily made up of non-UCGE faculty and staff. In addition, the committee includes the Director of General Education, the Assistant Director of Institutional Research and Assessment or designee, and one other UCGE member.
4. This sub-committee annually reports assessment findings to UCGE.

II. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have? No impact anticipated

III. **Related Policies/Procedures:** Describe other policies or procedures existing that are related or similar to this proposed change.

IV. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ______________________________________

Track #: ____________
Date Rec.: ____________
Posted: t-sheet ____________
h/c ____________
web ____________
Register: ____________

(Office Use Only)
A. FUNCTION.

A-1. General Education Assessment Committee (GEAC) serves as the body for oversight of general education assessment. The Director of General Education and the Assistant Director of Institutional Research and Assessment, or designee, will provide coordination and leadership.

A-2. The GEAC meets to norm and score assessment artifacts, and to review assessment findings and make recommendations based on its findings to UCGE.

[Information on general education assessment can be accessed at the general education website: http://www.uidaho.edu/class/general-education]

B. STRUCTURE AND MEMBERSHIP. The committee is composed of nine members as follows: Director of General Education as Chair, Assistant Director of Institutional Research and Assessment, or designee, one UCGE member, two undergraduate students, and four members (faculty/staff) to include one with interdisciplinary experience and the remaining three selected to ensure a broad representation across the eight colleges that offer baccalaureate programs. All members, except students, serve on three year staggered terms. The Director of General Education is responsible for the selection of committee members.
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □
Chapter & Title: FSH 1640.20 – University Budget & Finance Committee
Administrative Procedures Manual [APM] X Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to
apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all
changes must be made using “track changes.”

Originator(s): Norman Pendegraft 3.31.2015
Name ____________________ Date ______________
(See please FSH 1460 C)
Telephone & Email: norman@uidaho.edu
Policy Sponsor: (If different than originator.) Committee on Committees,
Name ____________________ Date ______________
Telephone & Email: Randy Teal, Chair rteal@uidaho.edu
Reviewed by General Counsel □ Yes □ No Name & Date: _______________

I. Policy/Procedure Statement: Briefly explain the purpose/raison of proposed
addition, revision, and/or deletion to the Faculty/Staff Handbook or the
Administrative Procedures Manual.

The UBFC having reviewed its structure and function are suggesting edits to reflect realistic
objectives for the committee.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion
have?

None.

III. Related Policies/Procedures: Describe other policies or procedures existing that are
related or similar to this proposed change.

IV. Effective Date: This policy shall be effective on July 1, or January 1,
whichever arrives first after final approval (see FSH 1460 D) unless otherwise
specified in the policy.

If not a minor amendment forward to: ______________________________________
Track # ____________
Date Rec.: _____________
Posted: t-sheet ________
h/c ________
web ________
Register: ______________
(Office Use Only)
A. FUNCTION. The function of the University Budget and Finance Committee is

A-1. To advise the president, provost and the executive director of planning and budget on matters pertaining to operating and capital budgets. The Committee will periodically review revenue streams (e.g., tuition, fees, indirect costs, etc.), revenue diminution (e.g., fee remissions, etc.), policy matters regarding the use of state appropriated funds, university expenditures (e.g., salaries, benefits, operating costs, capital outlays, etc.), operating and strategic reserves, long and short term capital plans, and deferred maintenance plans.

A-2. To be involved strategically in the university budget process. The Committee may help define the budget process and goals, and participate in university budget hearings and meetings.

A-3. To monitor consolidated financial reports for potential irregularities or imbalances and to comment on proposed corrective actions.

A-4. To initiate and/or respond to the study of budget and financial policies and issues.

A-5. To provide periodic reports to Faculty Senate and Staff Affairs on matters pertaining to university finances and budgets.

B. AGENDA. The agenda of each meeting will be set by the Chair of the committee in collaboration with the executive director of planning and budget and/or the provost. The executive director of planning and budget is the point of contact for the committee and is responsible for notifying the committee of relevant meetings dealing with university finances and budgets. The Senator in the second year, or designee, on the Budget and Finance Committee is responsible for reporting to the senate activities of the committee.

C. STRUCTURE AND MEMBERSHIP. The committee is composed of 11 voting members, all (except students) serving on three-year staggered terms, and 4 nonvoting members as follows: five faculty (two selected by Committee on Committees, three elected by Faculty Senate from among senators beginning their second year of service on the senate), three staff (not associated with the university financial or budget offices), three students (selected by the Committee on Committees from nominations provided by the Associated Students of the University of Idaho, Graduate & Professional Student Association and the Student Bar Association). Ex Officio (w/o vote) membership includes: Provost and Executive Vice President, Vice President for Finance and Administration, Executive Director of Planning and Budget, Budget Director, Director of Institutional Research and Assessment.

The committee's chair will be selected by the Committee on Committees from one of the five faculty members. A broad representation of faculty, staff and students across the various colleges of the university is expected.
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

[3/09]

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency  Minor Amendment □

Chapter & Title: ____________________________
Administrative Procedures Manual [APM] □ Addition X Revision* □ Deletion* □
□ Emergency  Minor Amendment □

Chapter & Title:  95.24 Vandal Alert Notification System (formerly Timely Warning)

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Matt Dorschel 2/27/15

(Please see FSH 1460 C) Name Date

Telephone & Email: 5-7209  mdorschel@uidaho.edu

Policy Sponsor: (If different than originator.)

Telephone & Email: ____________________________

Reviewed by General Counsel: Yes  Name & Date: Kent Nelson, 2/27/15

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual. The additions are a result of guidance from President Staben to include “informational alerts”. Additionally, the revisions reflect requirements of the Clery Act and ensure more complete compliance with the law.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?  No fiscal impact.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.  None

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.  ASAP.

If not a minor amendment forward to: ____________________________

Track # _______________
Date Rec.: _____________

Posted: t-sheet h/c ________
web___________

Register:  ______________
(Office Use Only)

Policy Coordinator
Appr. & Date: ____________________________
[Office Use Only]

FSH
Appr. ____________
FC ____________
GFM ____________
Pres./Prov. ____________
[Office Use Only]

APM
F&A Appr.: ____________________________
[Office Use Only]

(APM)
Preamble: This procedure was created updated in 2010-2015 to provide comprehensive guidance for issuing notifications to the University of Idaho community using the Vandal Alert System. The University’s goals are to provide prompt notification of a confirmed situation impacting the university community and to the campus community with a prompt notification of a confirmed situation and to provide instructions for taking action when needed. These protocols are integrated with and supplement the University’s Comprehensive Emergency Management Plan (CEMP) and Crisis Communication Plan. These protocols apply only to the Vandal Alert System, the University of Idaho may use other forms of communication as part of a broader communication strategy. A process for alerting the campus community to a crime that poses a threat and is updated annually. Also see Title 34 Code of Federal Regulations (CFR) 668.46 – Institutional Security Policies and Crime Statistics.

A. Definitions.

A-1. Vandal Alert System: Vandal Alert is an institution-wide, multi-modal (e-mail, voice, text message) emergency notification system. All University employees and students are enrolled automatically through employee/student database modules. Contact data/membership in Vandal Alert is updated daily through an automated process to ensure accurate membership. Students and employees are encouraged to update their Vandal Alert contact information through the Vandal Web application. Members of the greater Moscow community may also be enrolled in Vandal Alert. The Office of Public Safety and Security has overall management responsibility for Vandal Alert.

A-2. Emergency Notification (Clery Act Requirement): An alert issued to the campus community triggered by an event that is currently occurring on or imminently threatening the UI campus. UI will initiate emergency notification procedures for any significant emergency or dangerous situation occurring on campus that represents an immediate threat to the health or safety of students or employees occurring on the campus.

A-43. Timely Warning (Clery Act Requirement): An alert issued to the campus community triggered by Clery Act crimes that have already occurred but represent an ongoing threat. UI will initiate Timely Warning procedures when a Clery Act crime is committed on University property that is reported to campus security authorities or law enforcement authorities and is considered to represent a serious or continuing threat to students and employees to the occurrence of a crime that poses an ongoing threat to the campus community.
and to heighten safety awareness of students, faculty, and staff in a manner that will aid in the prevention of similar crimes.

**A-4. Adverse Weather Notification:** An alert issued to the campus community when projected or existing severe or adverse weather conditions may impact University operations requiring delays or cancellation of classes or events and/or the closure of a University facility, site or campus (see APM 95.21, University Closures).

**A-5. Informational Notification:** A notification issued to the campus community that does not meet the criteria for either an emergency notification or timely warning, but may be of significant interest to the university community.


**B. Policy/Procedure.**

**B-1. Emergency Notifications.** In compliance with The Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (20 USC § 1092(f)), Emergency Notifications will be broadcast when the University receives a confirmed report from a cognizant authority (i.e. a law enforcement authority), that a significant emergency or dangerous situation involving an immediate threat to the health or safety of students, faculty, staff or visitors is occurring on campus. In those instances, the Executive Director of Public Safety or designee will, without delay, and taking into account the safety of the community, determine the content of the notification and broadcast the notification, unless issuing a notification will, in the professional judgment of responsible authorities, compromise efforts to assist a victim or to contain, respond to or otherwise mitigate the emergency. Emergency Notifications will include instructions to the UI community for protective action. When the threat no longer exists, an “all clear” alert will be broadcast. The Executive Director of Public Safety and Security or designee has the authority to broadcast Emergency Notifications to the University community using the Vandal Alert System. When appropriate, Emergency Notifications may be broadcast through other communication methods (web pages, press releases, printed and/or social media, etc.)

The Clery Act requires institutions to make a “timely warning” to the campus community when a report of murder, sex offense, robbery, aggravated assault, burglary, motor vehicle theft, manslaughter, or arson is received by campus security authorities and, in the judgment of the institution, the crime at issue poses a serious or continuing threat to students and employees. The Act and its implementing regulations leave it to each institution to determine the suitability, timing and substance for these reports.
B-2. **At the University, the Office of Public Safety and Security (OPSS) is responsible for making these determinations and for issuing “timely warnings” when appropriate.**

**B-2. Timely Warning.** In compliance with The Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (20 USC § 1092(f)), Timely Warnings will be broadcast when a report of murder, sex offense, robbery, aggravated assault, burglary, motor vehicle theft, manslaughter, or arson (Clery Act Crimes) is received by campus security authorities and, in the judgment of the institution, the crime at issue poses a serious or continuing threat to students and employees. The Executive Director of Public Safety or designee will broadcast Timely Warnings using the Vandal Alert system in a manner that is timely and will aid in the prevention of similar crimes, **unless** issuing a warning will, in the professional judgment of responsible authorities, compromise efforts to assist a victim or to contain, respond to or otherwise mitigate the threat. The intent of a timely warning is to enable people to protect themselves and/or their property. Timely Warnings will be issued as soon as pertinent information is available. Timely Warnings may also be made for other crimes (non-Clery) that pose a serious or continuing threat to the campus community. The Executive Director of Public Safety and Security or designee has the authority to broadcast Timely Warnings to the University community. When appropriate, Timely Warnings may be broadcast through other communication methods (web pages, press releases, printed and/or social media, etc.)

**B-3. Adverse Weather Notification.** Adverse weather notifications will be broadcast when significant severe weather conditions exist that may have an impact on University operations and when the UI President or designee makes a decision to close or delay opening a UI facility. The University Emergency Manager monitors weather conditions, participates in the National Weather Service weekly briefing and makes recommendations for taking appropriate actions in the event of a weather related emergency (see APM 95.21, University Closures). The UI President or the president’s designee has the authority to close or delay opening a UI facility, they will notify the UI President’s office and to TThe Executive Director of Public Safety and Security. The Executive Director of Public Safety and Security or designee has the authority to broadcast an Adverse Weather Notification, and to notify the University community of approved closures or delays.

**B-4. Informational Notification.** Informational Notifications will be broadcast when a reported crime or emergency does not meet the criteria for other alerts, but in the judgment of the institution, the campus community should be notified about an incident. Situations that may be appropriate for broadcasting an informational
notification include (but are not limited to) incidents or crimes occurring off campus but due to the location that may have an impact on student or employee security interests, violent crimes in which the perpetrator or suspect has been apprehended or is known not to be on campus, and law enforcement agencies do not assess a threat to the university community, incidents that may generate significant interest across the campus community (for example, an incident that no longer represents a threat, but involved the response of multiple emergency vehicles/personnel). The Director of University Integrated Communications or designee and Marketing has the authority to broadcast an Informational Notification.

B-5. Vandal Alert System Testing. The University Emergency Manager will test the Vandal Alert System on an annual basis. Testing of the Vandal Alert System may be announced or unannounced. Test messages may be broadcast using a single mode or may combine multiple modes of the system. Test messages will clearly state in the subject line that there is no actual threat or emergency and that the purpose of the notification is to test the system and/or response plans and capabilities. To the extent possible, system tests will be combined with emergency response drills and will include follow-up assessment and review.

C. Procedure:

C-1. When the OPSS becomes aware of criminal incidents that in the judgment of OPSS and the University’s senior leadership constitute an ongoing or continuing threat to the campus community, the OPSS issues a timely warning to notify the community.

C-2. Depending on the particular circumstances, a timely warning may be disseminated by using one or a combination of the following: Vandal Alert, which may include e-mail, telephone message, and/or text message; various campus publications; the Public Safety and Security and University websites; and/or press releases. These methods of communication will provide pertinent information regarding the incident and may include other safety awareness tips.

C-3. A crime advisory will be distributed as soon as possible after the incident is reported; however, the release is subject to the availability of accurate facts concerning the incident.

C-4. To report a crime during daytime business hours call the Office of Public Safety and Security at 208-885-7074 or Campus Security 24/7 at 208-874-7550.

DC. Contact Information:
The Office of Public Safety and Security
875 Perimeter Drive, MS 2281
Moscow, ID 83844-2281
208-885-2254
Fax: 208-885-7001
campus-security@uidaho.edu
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

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<td>Administrative Procedures Manual [APM]</td>
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| Chapter & Title: | APM 70.23 University International Travel |

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Jill Kellogg-Serna 12.17.2014
(Please see FSH 1460 C)
Telephone & Email: 885-8475 jkellogg@uidaho.edu

Policy Sponsor: (If different than originator.)
John K. McIver, VRPED 2.13.2015
Katherine G. Aiken, Provost 2.13.2015
Telephone & Email:

Reviewed by General Counsel _X_ Yes ___ No Name & Date: Casey Inge 2.3.2015

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

This new policy was established to ensure that risk associated with University-related international travel is appropriately assessed and that international travel is undertaken by members of the University community in compliance with applicable export control and trade sanction regulations.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

Minimal.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

APM 5.05

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ____________________________

| Track # | ____________ |
| Date Rec.: | ____________ |
| Posted: t-sheet | h/c ___________ web |
| Register: | ______________________________________ |

Policy Coordinator
Appr. & Date: ____________________________
[Office Use Only]

FSH
Appr. ____________
FC ____________
GFM ____________
Pres./Prov. ____________
[Office Use Only]

APM
F&A Appr.: ____________
[Office Use Only]
A. Definitions.

A-1. Authorized Third Party. Any person not a University faculty, staff, or student, who is authorized to travel for University business, programs or other purposes, including, without limitation, volunteers, contractors, alumni, community members, guests, or public officials.

A-2. Faculty/Staff-Led University International Travel (FSIT). University International Travel led by a UI employee involving UI undergraduate or graduate students, faculty, staff, authorized third parties, alumni, or the public. This may include but is not limited to travel for study, research, field work, service, internship, or volunteer work.

A-3. Non-University International Travel. Travel outside the United States that is not related to University business, programs, or other purposes or that is not within the course and scope of University employment or responsibilities of a faculty or staff member or Authorized Third Party, for which the University assumes no control or responsibility, and provides no credit or funding. Individuals are not entitled to any international travel-related benefits during Non-University Travel. The following are some examples of Non-University International Travel: personal travel, such as spring break or vacation travel and travel that is not approved by the University. For purposes of this definition, travel to United States territories and associated states is considered “travel outside the United States.”

A-4. University International Travel. Travel outside the United States that: 1) is related to University business, programs, or other purposes, or that is within the course and scope of University employment or responsibilities of a faculty or staff member or Authorized Third Party, and 2) meets the conditions and has been reviewed and approved consistent with the requirements set forth in this procedure. For purposes of this definition, travel to United States territories and associated states is considered “travel outside the United States.”

A-5. Travel Warning. Issued by the U.S. Department of State to describe conditions that make a country dangerous or unstable. A travel warning is also issued when the U.S. government’s ability to assist American citizens is constrained due to the closure of an embassy or consulate or because of a drawdown of its staff. A current list of countries with a U.S. Department of State Travel Warning can be found through the International Programs website at: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/international-travel.

A-6. University International Emergency Management Team (“UIEMT”). An ad hoc group consisting of University administrators who support and assist faculty, staff and students who are participating in University travel or are otherwise on University business abroad to address emergencies, such as outbreaks of violence, political unrest, or medical emergencies. The UIEMT also considers requests for exceptions to this policy prior to international travel. The
UIEMT is composed of the Director of the International Programs Office, the Study Abroad Director, the Vice Provost for Student Affairs or representative, Office of Risk Management (Risk) representative(s), Legal Counsel (as needed), and other faculty/administrators as needed.

Note: Other University support services are available to support travelers when they return or to support the UIEMT, as necessary. These services include but are not limited to the Counseling and Testing Center, Student Health, and the Student Health Insurance Program.

B. International Travel Approval Procedure.

B-1. In keeping with its commitment to compliance with federal law and to the safety of its employees and students, the University of Idaho will not authorize international travel by faculty, staff, authorized third parties, or students on behalf of or under the auspices of the University, unless that travel has been reviewed and approved consistent with the procedures set forth herein and procedures supplemented by this section, including the University Administrative Procedures Manual (“APM”) Section 45.19, U.S. Export Controls; APM Chapter 70, Travel Management; and APM Chapter 05, Risk Management.

a. In order for international travel by University faculty, staff, or authorized third parties to be considered University International Travel, such travel must, prior to departure, be:

(i) Registered with the International Programs Office (“IPO”) through its online international travel registration system available at: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/international-travel/international-travel-registration;

(ii) Reviewed by IPO and Risk for insurance or waivers that may be required under University policy and/or by UIEMT for travel to Travel Warning countries (see APM 05.05 and Section B-4, below.)

(iii) Approved in advance through the use of a travel authorization (see APM 70.05);

(iv) Reviewed for any applicable export control and trade sanction restrictions or prohibitions by the University export control analyst, Office of Research and Economic Development (“ORED”) (see Section B-3 below; APM 45.19).

To ensure adequate time for any review or approval required under Section B-1(a), all required information and materials should be submitted not later than thirty (30) days prior to departure. Units under this Section may be unable to timely complete the necessary reviews and approvals when information or materials is supplied less than thirty (30) days prior to departure; the University does not, in these circumstances, guarantee completion of such approvals or reviews.

Responsible units receiving timely submitted materials for review under Section B-1(a) should complete review and/or provide approval or should communicate the reason for the denial or delay within twenty-one (21) days from receipt of the materials.
b. In order for faculty and/or staff-led international travel to be considered FSIT (see definition in A-2 above), such travel must be:
   (i) Approved by IPO by the deadlines listed below. Faculty/Staff leaders can submit a preliminary proposal for such travel through its online international travel system available at: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/taking-students-abroad.

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<th>Deadline</th>
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</thead>
<tbody>
<tr>
<td>Fall, Fall Break Winter Intersession</td>
<td>December 1 of prior year</td>
</tr>
<tr>
<td>Spring, Spring Break, Summer</td>
<td>August 1 of prior year</td>
</tr>
</tbody>
</table>

   (ii) Reviewed by IPO and Risk for insurance or waivers that may be required under University policy and/or by UIEMT for travel to Travel Warning countries (see APM 05.05 and Section B-4 below.)

   (iii) Reviewed by IPO for adherence to University policies regarding risk management, FSIT program budget, student fee creation, and contracts.

   (iv) Approved in advance through the use of a travel authorization (see APM 70.05);

   (v) Reviewed for any applicable export control and trade sanction restrictions or prohibitions by the University export control analyst, ORED (see Section B-3 below; APM 45.19).

c. In order for international travel by University students to be considered University International Travel, such travel must be:
   (i) Approved by IPO by the deadlines listed below. Students can apply through its online international travel system available at: http://www.uidaho.edu/international/study-abroad/steps-to-studying-abroad/step-2-apply.

<table>
<thead>
<tr>
<th>Term Abroad</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>April 1</td>
</tr>
<tr>
<td>Fall Break</td>
<td>May 1</td>
</tr>
<tr>
<td>Academic Year</td>
<td>April 1</td>
</tr>
<tr>
<td>Winter Intersession</td>
<td>October 15</td>
</tr>
<tr>
<td>Spring</td>
<td>October 15</td>
</tr>
<tr>
<td>Spring Break</td>
<td>January 31</td>
</tr>
<tr>
<td>Summer</td>
<td>April 1</td>
</tr>
<tr>
<td>Non-Study Abroad Travel (Ex. Conferences, meetings, short-term research activities)</td>
<td>30 Days Prior to Departure</td>
</tr>
</tbody>
</table>

   (ii) Reviewed by IPO and Risk for insurance or waivers that may be required under University policy and/or by UIEMT for travel to Travel Warning countries (see APM 05.05 and Section B-4 below).

   (iii) Reviewed for any applicable export control and trade sanction restrictions or prohibitions by the University export control analyst, ORED (see Section B-3 below; APM 45.19).

Failure by a student to receive review and/or approval required under Section B-1 (c) may result in the student (i) not receiving academic credit, (ii) not being eligible to receive any financial aid, and/or (iii) having to reimburse the University for any University monies disbursed.
Timely registration and submission of required information for review under Section B-1 (a), (b) or (c) does not guarantee that the University can approve travel by the anticipated travel date (see e.g. Section B-2 below).

Any international travel undertaken without prior review and approval required under Section B-1 shall be considered Non-University International Travel and will not be paid for or reimbursed by the University, including but not limited to charging of costs associated with Non-University International Travel to research grant or contracts. In addition, any traveler on Non-University International Travel will not be eligible for coverage under the University’s insurance policy while travelling, and the defense of any legal matters arising from the travel will be solely the individual’s responsibility. While abroad on Non-University International Travel, University faculty, staff, authorized third parties or students on Non-University International Travel shall not represent that they are acting on behalf of or with the authorization of the University of Idaho. Nor shall University faculty, staff, authorized third parties, or students take University equipment or resources on Non-University International Travel. University-imposed sanctions may apply for non-compliance with this policy.

B-2. Export Control and Trade Sanctions Review. The University, and University faculty, staff, authorized third parties, and students traveling abroad, must consider the effect of U.S. export control and trade sanction and embargo laws and regulations on any proposed international travel to ensure that the University and the traveler(s) are in compliance with U.S. law. Violation of these complex laws and regulations can result in severe criminal and civil penalties to both the individual traveler and the University. University faculty, staff, authorized third parties, or students traveling abroad may become “exporters” through taking controlled technology or other controlled information (including, for example, information in papers or stored on laptop computers to a foreign country and/or disclosing such information to non-U.S. persons or through taking or shipping controlled tangible items (including, for example, laptops, sensors, test instrumentation, biological materials or other similar tangible goods) to a foreign country or non-U.S. person. Similarly, University personnel and students may engage in regulated transactions through engaging in financial transactions with, or providing goods or services to, countries or designated nationals of countries subject to trade sanctions or embargoes. In the case of Cuba, travel to the country itself is regulated and cannot be undertaken without appropriate federal authorization.

The University of Idaho’s export control analyst in the Office of Research and Economic Development will assist personnel in determining the applicability of export control and trade sanction and embargo regulations and obtaining any necessary licenses: (208) 885-6651 or ored-export@uidaho.edu. Should the analyst determine that a license is required, please note that it may take several months to receive a federal license determination, and, if granted, a license. It may take seven or more months for a license determination involving nations with OFAC-enforced sanctions. University personnel requesting travel must plan accordingly. Please see the University website for information about OFAC and other export regulations: http://www.uidaho.edu/research/export-control. For information regarding OFAC sanctions program countries, please see http://www.treasury.gov/resource-center/sanctions/Programs/Pages/Programs.aspx.
B-3. Role of the International Programs Office in University International Travel. IPO provides reasonable services to assist in University International Travel, including, but not limited to, securing necessary insurance coverage for students, advising regarding insurance coverage for staff, faculty, and affiliate participants, providing and collecting necessary University waivers, student disciplinary and medical histories, and the monitoring of government and international sources for the latest information affecting the safety and security of regions where the travel is to take place. IPO also facilitates communications and acts as liaison between the University and all foreign centers and affiliated foreign universities. IPO services include:

a. **Student Travel.** Programmatic, pre-departure, and risk management oversight.

b. **Faculty/Staff University International Travel without Students or Others.** Traveler tracking and travel insurance advisement responsibilities.

c. **Faculty/Staff-Led University International Travel (FSIT) with Students or Others.** Programmatic, pre-departure, risk management, contract consultation and support, budget and program fee oversight, travel authorizations, student fee assessment, and payment of overseas vendors.

d. **Program safety and security.** IPO is responsible for monitoring alerts and warnings regarding the regions in which University-approved student or FSIT is taking place.

   (i) Students, authorized third parties, staff, and faculty participants will be notified prior to departure of any known issues, alerts, or warnings which may affect their destination. If the travelers have already departed, the University will use reasonable measures to communicate any known necessary and relevant travel alerts/warnings to program participants.

   (ii) Severe security and safety concerns may result in the non-approval of travel, the suspension of international travel and withdrawal of all travelers from the region, and/or the amendment of the program curriculum (if applicable), with assistance provided by IPO, Risk, and other departments as necessary (see Section B-4 below).

e. **IPO Fees.** IPO will charge a per-participant application fee and depending on the program, a registration/programming fee for their services. Payment of these fees is required before the travel will be approved.

B-4. University International Travel – Travel Warning Countries. The University strongly discourages all travel to Travel Warning countries or regions when viable alternatives are available. If a Travel Warning goes into effect during University travel, the U.S. Embassy/Consulate in that region must be contacted immediately and any guidance provided regarding immediate departure must be followed.

a. **Student Travel.** University International Travel by students to University-affiliated universities or programs where a Travel Warning is in place is
prohibited, especially if alternative venues for projects and research are available. If there is a compelling academic or other reason why a student must travel to a Travel Warning country, the student can petition the UIEMT for approval to travel there. If the student receives approval from the UIEMT to travel to a Travel Warning country, the student should closely monitor the situation to determine if he/she should continue as planned, while keeping his/her safety foremost in mind. If permission is denied by the UIEMT and the student decides to travel to the Travel Warning country anyway, this travel will be considered Non-University International Travel and the student will not be eligible to receive academic credit, funding, or other kinds of support from the University.

If a Travel Warning goes into effect during a University study/research program, the U.S. Embassy/Consulate in that region and IPO must be contacted immediately and any guidance provided regarding immediate departure must be followed. If a student chooses to remain in the country despite the guidance provided regarding immediate departure, the student’s travel will be converted to Non-University International Travel. The student’s registration at the UI will be cancelled and any financial aid or other payments for said program will be recalled in accordance with federal financial aid regulations.

Students who express the intent to travel to or remain in regions subject to TravelWarnings must sign a separate University Acknowledgement of Risk and Waiver of Liability form, recognizing such voluntary intent to travel to/remain in the region against the University’s advice and releasing the University from any additional liability or return arrangements. This release will be kept on file with IPO.

University units are prohibited from financially supporting student travel to Travel Warning countries through travel grants or any other means, except in the case that the travel has been preapproved by UIEMT. Every unit should discourage any travel to Travel Warning countries.

b. **Employee Travel.** Travel to Travel Warning countries is permitted, but discouraged, especially if alternative venues for projects and research are available. Faculty/staff members are required to register their travel with IPO prior to departure.

The traveler’s unit must consult with IPO and Risk prior to departure to a Travel Warning country to ensure appropriate insurance coverage for medical evacuation, security evacuation, and repatriation, the cost of which the units of the employee traveling must bear.

c. **Faculty/Staff-Led International University Travel.** Faculty/Staff-Led travel with students or others to Travel Warning countries is prohibited.

C. **Contact Information.** Problems or questions concerning these requirements for international travel can be addressed to:

**Study Abroad**

Email: abroad@uidaho.edu
D. Forms and Examples.

D-1. Faculty/Staff/Affiliate Travel Registration
http://www.uidaho.edu/international/ui-faculty-staff-opportunities/international-travel/international-travel-registration

D-2. Faculty-Staff-Led International Travel Proposal Form and Guidelines
http://www.uidaho.edu/international/ui-faculty-staff-opportunities/taking-students-abroad

D-3. Student Process for University International Travel
http://www.uidaho.edu/international/study-abroad/steps-to-studying-abroad/step-2-apply
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

[3/09]

Policy Coordinator
Appr. & Date:
[Office Use Only]

APM
F&A Appr.: ________
[Office Use Only]

FSH
Appr. ___________
FC ___________
GFM ___________
Pres./Prov. ___________
[Office Use Only]

Track # ___________
Date Rec.: ___________
Posted: t-sheet ___________
h/c ___________
web ___________
Register: ___________
(Office Use Only)

Faculty/Staff Handbook [FSH] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □

Chapter & Title:

Administrative Procedures Manual [APM] □ Addition □ Revision* □ Deletion*
□ Emergency Minor Amendment □

Chapter & Title: 05.05 – International Travel and Insurance

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): Jill Kellogg-Serna 10/28/14
(Please see FSH 1460 C)
Name Date
Telephone & Email: 885-8475 jkellogg@uidaho.edu

Policy Sponsor: (If different than originator.) Keith Goodenough 10/28/14
Name Date
Telephone & Email: 885-6177 kgoodenough@uidaho.edu

Reviewed by General Counsel _X__ Yes __No Name & Date: Casey Inge 2.3.2015

I. Policy/Procedure Statement: Briefly explain the purpose/ration of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

To implement an policy on insurance and risk evaluation for international travel policy that meets best practices and complements the new University International Travel Policy (APM 70.23).

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have?

None.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

APM 70.23

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

If not a minor amendment forward to: ________________________________
A-1. Accidental Death and Dismemberment (AD&D) is insurance that provides a $100,000 limit for university employees who die in travel-related accidents (domestic or overseas). Lower limits are available for travel-accident dismemberments. Coverage is automatic for university employees and does not require enrollment.

A-2. Acknowledgement of Risk and Waiver of Liability (Waiver) is a legal document that lists the particular dangers for an activity, and states that the individual accepts the risks in exchange for participating in the activity and waives liability against the university. Waivers are prepared by the Office of Risk Management (Risk) in consultation with the Office of General Counsel.

A-3. Authorized Third Party. Any person not a University faculty, staff, or student, who is authorized to travel for University business, programs or other purposes, including, without limitation, volunteers, contractors, alumni, community members, guests, or public officials. [add. 2-15]

A-34. Commercial General Liability is insurance that provides coverage for claims of bodily injury or property damage to third parties, arising from activities of university employees. Third parties are people or entities other than university employees or the university itself. Coverage is automatic for university employees, and does not require enrollment. [ren. 2-15]

A-45. Foreign Liability is insurance that provides Commercial General Liability coverage for suits brought against the university in a foreign country. The State of Idaho’s program of risk and insurance provides coverage for suits brought within the United States of America. Coverage is automatic for university employees and does not require enrollment. [ren. 2-15]

A-56. Foreign Voluntary Workers Compensation is insurance that provides coverage for workers compensation claims brought by foreign nationals hired overseas by the university. [ren. 2-15]

A-7. Repatriation is assistance in retrieving and transporting mortal remains in the event of a death. [add. 2-15]

A-8. Security Evacuation is assistance in extracting travelers from threatening emergency situations such as natural disaster, civil unrest, or terrorism. [add. 2-15]

A-96. Travel Assistance Services is insurance that provides services to travelers and typically includes help in arranging medical services, medical evacuations, and repatriation of remains. This coverage varies widely by provider and each policy must be studied to determine which services are offered by the particular provider. Coverage is not automatic and requires enrollment and payment of premium at least 60 days before departure. [ren. 2-15]
A-10. Travel Warning. see University International Travel - APM 70.23. [add. 2-15]

A-11. University International Travel is travel outside the United States that: 1) is related to University business or programs or that is within the course and scope of University employment of a faculty or staff member or authorized third party, and 2) that meets the conditions and has been reviewed and approved consistent with the requirements set forth in APM 70.23. For purposes of this definition, travel to United States territories and associated states is considered “travel outside the United States.” [add. 2-15]

B. Policy.

B-1. Student Travel. In addition to other requirements from their applicable colleges, students shall obtain and purchase Travel Assistance Services coverage and sign a Waiver before participating in student travel at least 60 days before departure. All students traveling abroad (i) on a trip organized by a University unit, (ii) for pre-approved academic credit, and/or (iii) utilizing University monies, must comply with procedures set forth in APM 70.23, section B(1)(b). Failure to do so may result in (i) not receiving academic credit, (ii) not being eligible to receive any financial aid, and/or (iii) having to reimburse the University for any University monies disbursed. [rev. 2-15]

Employees who are responsible for planning and/or organizing student travel, or advising students about independent study, volunteer work, research or internship that includes overseas travel, must ensure that the student completes all requirements with the International Programs Office (IPO) by the deadlines listed and are thus following the established procedures for student travel abroad. They shall carefully review their responsibilities and seek appropriate advice and guidance in the planning stages from Risk and the International Programs Office (IPO). [rev. 2-15]

B-2. Employee Travel. In addition to planning their travel schedules and program activities, employees-faculty, staff or authorized third parties of the university who plan to travel overseas on University business must get prior approval for the travel. See the procedures set forth in APM 70.23. Faculty, staff, or authorized third party should consult with Risk and IPO to carefully consider other aspects of travel, including but not limited to health and security conditions in the countries to be visited and should consult with Risk and IPO. Faculty, staff and authorized third parties are responsible for fulfilling all requirements, including applying for visas, making adequate plans for emergency assistance overseas. The university participates in the Risk and Insurance Program of the State of Idaho, which includes automatic coverage for employees for Foreign Liability, which includes Commercial General Liability, Foreign Voluntary Workers Compensation, and limited Travel Assistance Services. Supplemental Travel Assistance Services coverage would need to be purchased at least 60 days in advance of departure. [rev. 2-15]

B-3. Faculty/Staff-Led International Travel (FSIT). Employees traveling abroad with students, faculty, staff, authorized third party, alumni, or the public for any reason (study, research, volunteer work, or any other activity that a University unit organizes, funds, and/or awards credit) must adhere to the guidelines, timelines and procedures set forth in APM 70.23. [add. 2-15]

Employees may not promote or accept applications for such travel prior to: receiving approval from their Unit Administrator or Supervisor, College Dean or Vice-President, and the IPO; and receiving approval for University International Travel as required under APM 70.23. [add. 2-15]
(i) **Contract Requirements.** Faculty/Staff-Led International Travel Involving a Third-Party Provider and/or educational institution requires the completion of a Service Contract (see APM 60.20). The Study Abroad section of IPO provides contract support to develop and process contracts for these purposes through the appropriate University channels.  

**B-4. Insurance for University-Related International Travel**  

(i) **Students.** All students participating on University-travel will either be provided with sufficient international medical insurance by their study abroad program provider or will be required to purchase insurance secured by the University that meets University requirements for international travel.

(ii) **Employees.** The University participates in the Risk and Insurance Program of the State of Idaho, which includes coverage for employees for Foreign Liability, Commercial General Liability, Foreign Voluntary Workers Compensation, and limited Travel Assistance Services. Employees travelling on University business are eligible for coverage through the University’s vendor at no cost to them or the sponsoring unit. However, the State of Idaho coverage is not considered sufficient in the area of Travel Assistance Services which provides medical evacuation and repatriation insurance and a variety of other travel support services.

University employees enrolled in the University medical insurance benefits program, will have this coverage while abroad. However, the providers abroad may not bill the insurance company on the employee’s behalf. Also, the University insurance provider may not have the network or connections needed at the time of the illness or injury to provide sufficient medical, medical evacuation or repatriation services. If an employee opts out of the University health insurance benefit, he/she should check with his/her personal medical benefits provider for coverage overseas.

It is suggested that the University unit purchase supplemental insurance for employees traveling abroad on University business.

(iii) **Faculty/Staff-Led International Travel.** The organizing University unit must purchase insurance secured by the University that meets University requirements for international travel.

(iv) **B-3. Permanent overseas operations.** Employees planning operations, research or activities overseas, lasting six or more months, must consult Risk regarding foreign coverage.

(v) **C-3. International Business Insurance.** (also see (iv)B-3 above). While Foreign Liability and Foreign Voluntary Workers Compensation is automatic for university employees, other types of coverage and related issues may be involved and must be researched by Risk. For example, some countries have compulsory business insurance and Idaho Workers Compensation is affected by the length of stay overseas. For any university operation, research or activity that lasts six or more months, consult Risk for assessment and advice. Risk will need to know a roster of employees living overseas, their payroll and activities, whether or not foreign nationals will be hired, a detailed description of planned operation and/or itineraries, location descriptions, and values of buildings and business personal property. Additional questions from underwriters may be asked.
C. Process/Procedure.

C-1. Student Travel. Students must register an international trip or apply to study, intern, volunteer, research abroad through the IPO Study Abroad website at: http://www.uidaho.edu/international/study-abroad/steps-to-studying-abroad/step-2-apply. Employees leading or responsible for student(s) or student groups on overseas trips must collect overseas travel Waivers from the students prior to departure. These Waivers are arranged only through Risk (see D below) and must not be altered in any way. Employees also should consult with IPO for issues related to student travel to or from the university. [rev. 2-15]

Students must obtain Travelers Assistance Services coverage that covers all costs of repatriation. Proof of coverage, including contact information of company and policy number should be with the traveler at all times and a copy must be provided to university staff. Risk has Travel Assistance Services coverage available for students to purchase. Students must provide details about themselves, the trip, and pay in advance to participate in this coverage.

Employees who are responsible for planning and or organizing student travel or advising students about independent study that includes overseas travel must schedule a planning meeting with Risk. From this planning meeting, Risk will develop a Waiver and obtain General Counsel’s approval. Once it is appropriately reviewed and accepted, the Waiver will be sent to the employee to obtain signatures from all students who are traveling prior to departure. Students who refuse to sign a waiver may not travel through the University program. The completed waiver should be kept on file for one year from the last date of activity at the unit level with the traveler’s other documents.

C-2. Employee Travel. Employees must register their international university traveling at http://www.uidaho.edu/international/ui-faculty-staff-opportunities/international-travel/international-travel-registration. To facilitate this process, when a travel authorization is submitted to Travel Services the traveler receives an email prompting him/her to register the travel with IPO. Overseas for University business will need to contact Risk for travel assistance services at least 60 days in advance of their departure date to receive coverage contact information, policy number, and service details. Coverage is automatic for employees.

Within the Travel Registration system, IPO provides suggested coverage amounts, a link to the University insurance program providers abroad, State of Idaho Travel Assistance Services’ insurance coverage information, and a link to other supplemental insurance options. [rev. 2-15]

If after review of the state provided travel assistance services, the employee determines that additional coverage, benefits, or services are needed, they will be responsible for researching, enrolling, and paying the additional coverage.

C-3. Faculty/Staff-Led International Travel (FSIT). Employees must submit a proposal to take students, faculty, staff, authorized third party, alumni, or the public abroad at: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/taking-students-abroad. [add. 2-15]

C-4. Annual Foreign Travel Report for Foreign Liability Coverage. For underwriting and premium calculation purposes, university deans are asked to provide an annual Foreign Travel Report to Risk regarding overseas activities and travel by employees. For specific instructions see link in Section E.
D. Contact Information. Problems or questions concerning the requirements for foreign travel and insurance, medical evacuation assistance can be addressed to Risk: (208) 885-7177, risk@uidaho.edu, or faxed to (208) 885-9490 or the Study Abroad section of IPO: (208) 885-8475, abroad@uidaho.edu, or faxed to (208) 885-2859.

E. Forms and Examples. Annual foreign travel report, overseas travel waivers, and other forms including instructions and examples can be viewed at www.uidaho.edu/risk/insurance/foreigntravel.

E-1. Risk Management forms including instructions and examples can be viewed at www.uidaho.edu/risk/insurance/foreigntravel.
E-2. Faculty/Staff Travel Registration: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/international-travel/international-travel-registration
E-3. Faculty-Staff-Led International Travel Proposal Form and Guidelines: http://www.uidaho.edu/international/ui-faculty-staff-opportunities/taking-students-abroad
POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

Administrative Procedures Manual [APM] X Addition □ Revision* □ Deletion* □ Emergency

APM 45.[XX] University of Idaho Unmanned Aircraft Systems (“UAS”)

Minor Amendment □

All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

Originator(s): John K. McIver  3.23.2015
Name Date
Telephone & Email: 885-6689
jmciver@uidaho.edu

Policy Sponsor: (If different than originator.)
Name Date
Telephone & Email:

Reviewed by General Counsel  ____X_ Yes ____No Name & Date: Casey Inge (3.17.2015)

I. Policy/Procedure Statement: Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

Policy is intended to ensure that the University operates any unmanned aircraft system in the furtherance of its educational, research, and service missions, as well as in compliance with applicable federal and state laws by identifying a Committee and institutional official with responsibility for review and approval of University UAS operations.

II. Fiscal Impact: What fiscal impact, if any, will this addition, revision, or deletion have? None.

III. Related Policies/Procedures: Describe other policies or procedures existing that are related or similar to this proposed change.

This policy is the counterpart to APM 95.XX, Personal Use of Unmanned Aircraft Systems on Campus, which prohibits personal UAS use on University property. See also APM 35.35, Section I.

IV. Effective Date: This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

This policy is to be effective immediately.
APM 45.35-- University of Idaho Unmanned Aircraft Systems ("UAS")
Created: March 17, 2015

Preamble: This policy, and the related policies and procedures described herein, is intended to ensure that the University operates any unmanned aircraft system in the furtherance of its educational, research, and service missions, as well as in compliance with applicable federal and state laws. This policy shall be effective immediately.

Contents:
A. Definitions
B. Policy
C. Process/Procedure
D. Contact Information

A. Definitions.

A-1. Aircraft means any contrivance invented, used, intended to be used, or designed to navigate, or fly, in the air.

A-2. Unmanned Aircraft System ("UAS") means an aircraft that is operated without the possibility of direct human intervention from within or on the aircraft and associated elements (including communication links and the components that control the unmanned aircraft) that are required for the pilot in command to operate safely and efficiently in the navigable airspace of the United States under the regulatory authority of the Federal Aviation Administration ("FAA").

A-3. Certification of Waiver; Certificate of Authorization ("COA") means a Federal Aviation Administration grant of approval for a specific unmanned aircraft flight operation.

A-4. Navigable Airspace means the airspace of the United States above the minimum altitudes of flight prescribed by the regulations of the FAA, including airspace needed to ensure safety in the takeoff and landing of aircraft.

A-5. Public Operation COA means a COA grant by the FAA for a public aircraft operation. Public aircraft operations are those conducted by a public agency, like the University, in furtherance of a governmental function.

A-6. Governmental Function means an activity undertaken by a government, such as national defense, intelligence missions, firefighting, search and rescue, law enforcement
(including transport of prisoners, detainees, and illegal aliens), aeronautical research, biological or geological resource management.

A-7. **Civil Operation** means any UAS operation falling outside the scope of a public aircraft operation, such as an operation involving a commercial purpose or an operation involving research outside the definition of governmental function. FAA authorization to fly a UAS in a civil operation may be granted under a Section 333 Exemption or a Special Airworthiness Certificate. In addition to obtaining FAA authorization for a Civil Operation, a COA must also be obtained from the FAA for any civil UAS flight operations.

A-8. **Commercial Purpose** means the transportation of persons or property or other use of UAS for compensation or hire.

B. **Policy.**

B-1. **Introduction.** The University, in carrying out its educational, research, and service missions, may make use of Unmanned Aircraft Systems ("UAS"), more commonly known as "drones," in Navigable Airspace when granted authorization to do so by the FAA. As a "governmental instrumentality for the dissemination of knowledge and learning," the University of Idaho is eligible for Public Operation certificates of waiver or authorization ("COAs") from the FAA that permit the University to fly UASs in the furtherance of a Governmental Function and where use of UAS would otherwise be prohibited under current law. The University has committed to the FAA that it will not use any UAS for purposes that are not Governmental Functions, including but not limited to Commercial Purposes, except as otherwise authorized by the FAA, including but not limited to authorization through a Special Airworthiness Certificate, Experimental Category, or through exceptions that may be granted under Section 333 of the FAA Modernization and Reform Act of 2012 ("Section 333"). This policy is intended to ensure University compliance with federal and state laws regarding UAS.

B-2. **Policy.** No use of UAS may be undertaken by University faculty, staff, and students, or by third parties (including, but not limited to, consultants or contractors) acting on behalf of the University, without: 1) prior review by the UAS Committee; 2) approval by the Vice President for Research and Economic Development ("VPRED"), and 3) approval by the
FAA of a COA and/or other authorizations or exemptions applicable to the University use.

Personal use of UAS by University faculty, staff, students, or third parties on University property, including but not limited to recreational or hobby flight of model aircraft, is governed by APM 95.35, Personal Use of Unmanned Aircraft Systems on Campus, which prohibits such use on University property. See also APM 35.35, Public Use and Liabilities.

C. Scope of Authority and Responsibility for Review, Approval, and Monitoring of University Use of UAS.

C-1. UAS Committee. The UAS Committee is an ad-hoc committee established by the President, pursuant to FSH 1620B-3, to advise the VPRED, who acts on behalf of the President in matters related to the use of UAS. The Committee will report to the VPRED. The UAS Committee is the principal mechanism by which the University ensures that it is meeting its obligations under federal and state law applicable to UAS use and under any COA approved by the FAA and that ethical issues related to UAS use is given due consideration prior to use.

C-2. The UAS Committee will review and make a formal recommendation to the VPRED, or his or her designee, regarding any proposed use of UAS in Navigable Airspace by any members of the University of Idaho community, including faculty, staff, students, or by third parties acting on behalf of the University. The UAS Committee will consider the legal and ethical issues related to the UAS use and apply relevant law, guidance from federal agencies, etc., in determining whether a proposed use should be recommended to the VPRED for approval.

The UAS Committee will determine whether a proposed use can be recommended for approval as described, needs modification to be recommended for approval, or should be denied. The UAS Committee shall only recommend for approval those uses that it reasonably believes: to be a Governmental Function and therefore eligible for a Public Operations COA; to be within those areas of activity covered by other authorizations or exemptions that may be granted by the FAA to the University for Civil Operations; or to be covered by an authorization by the FAA for Civil Operations held by a third party, subject to an agreement between the University and third party with respect to such services.
The UAS Committee may deny a proposed UAS use on the basis of factors including, but not limited to: the proposed use constitutes a Commercial Purpose; the proposed use is not a Governmental Function eligible for coverage by a Public Operations COA; the proposed use is not covered by other forms of authorization by the FAA for Civil Operation of UAS; or the proposed use is prohibited by law without written consent of the individual or the owner of a farm, dairy, or other agricultural industry, and such consent has not and/or cannot be obtained.

If the UAS Committee denies a proposed use, the denial may be appealed, in writing, to the VPRED. Any proposed use which the UAS Committee determines needs modification may be recommended for approval, following completion of any required modifications.

The UAS Committee, with the assistance of the Office of Research Assurances ("ORA"), shall provide ongoing review of any use approved by the VPRED and covered by a COA issued or other forms of authorization provided by the FAA. The UAS Committee may, with the assistance of ORA and subject to approval by the VPRED, develop and implement: standard operating procedures for use and operation of UAS; procedures for submission of a proposal to the UAS Committee; procedures for appeal to the VPRED of any denial of a proposed UAS use by the UAS Committee; and internal rules and procedures for the operation and administration of the UAS Committee, as may be consistent with this policy.

The Committee may recommend suspension or termination of any use it deems inconsistent with the use approved by the VPRED and/or the requirements of the applicable COA or other authorization granted by the FAA. Authority to suspend or terminate any previously approved use rests solely with the VPRED, or designee.

C-3. Approval by VPRED. Any proposed use of UAS recommended for approval by the UAS Committee shall be reviewed by the VPRED, or designee, and approved or denied. Only those uses approved by the VPRED may be covered by: a COA application submitted by the University to or a University-held COA approved by the FAA; an application submitted by the University for authorization for Civil Operations; or a Public Operations COA or other authorization from the FAA for Civil Operations held by a third party performing services on behalf of or collaborating with the University. Only the VPRED, or designee, may submit an application for a Public Operations COA to the FAA and/or submit an application for authorization
for Civil Operations to the FAA, after consultation with the Office of General Counsel.

The VPRED may, at his or her sole discretion, suspend or terminate any previous approval of UAS under this policy on the basis that actual use is inconsistent with the previous grant of approval by the VPRED and/or the requirements of an applicable COA.

D. **Contact Information.** For further information regarding implementation of this policy you may contact the Office of Research Assurances, the UAS Committee, or visit the University UAS website.
# POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website:
www.webs.uidaho.edu/uipolicy)

<table>
<thead>
<tr>
<th>Administrative Procedures Manual [APM]</th>
<th>X Addition</th>
<th>□ Revision*</th>
<th>□ Deletion*</th>
<th>□ Emergency</th>
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<tbody>
<tr>
<td>Chapter &amp; Title: APM 95.[XX] University of Idaho Unmanned Aircraft Systems (“UAS”); APM 35.35 Public Use and Liabilities (Revision)</td>
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All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using “track changes.”

<table>
<thead>
<tr>
<th>Originator(s):</th>
<th>Matt Dorshel</th>
<th>3.23.2015</th>
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<tr>
<td>(Please see FSH 1460 C)</td>
<td>Name Date</td>
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</tr>
<tr>
<td>Telephone &amp; Email:</td>
<td>885-7209 <a href="mailto:mdorschel@uidaho.edu">mdorschel@uidaho.edu</a></td>
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<tr>
<th>Policy Sponsor:</th>
<th>(If different than originator.)</th>
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<tr>
<th>Reviewed by General Counsel</th>
<th>X Yes ____ No</th>
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<td>Name &amp; Date: Casey Inge (3.17.2015)</td>
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I. **Policy/Procedure Statement:** Briefly explain the purpose/reason of proposed addition, revision, and/or deletion to the Faculty/Staff Handbook or the Administrative Procedures Manual.

This policy prohibits the personal use of UAS, including model aircraft, on University property, due to safety, privacy, and other concerns such use presents. Changes to APM 35.35 have been made to correspond to the prohibition in the new policy.

II. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?

None.

III. **Related Policies/Procedures:** Describe other policies or procedures existing that are related or similar to this proposed change.

This policy is the counterpart to APM 45.XX, University of Idaho Unmanned Aircraft Systems, which sets forth the review, approval, and oversight procedures for use of UAS under the auspices of the University.

IV. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

This policy is to be effective immediately.

If not a minor amendment forward to: __________________
APM 95.35 Personal Use of Unmanned Aircraft Systems on Campus
Created: March 17, 2015

Preamble: This policy is intended to address safety, privacy, and other concerns related to the personal use of unmanned aircraft systems on University property. This policy is to be effective immediately.

Contents:
A. Definitions
B. Policy

A. Definitions

A-1. Aircraft means any contrivance invented, used, or designed to navigate, or fly in, the air.

A-2. Unmanned Aircraft System ("UAS") means, for the purposes of this policy, an aircraft that is operated without the possibility of direct human intervention from within or on the aircraft and associated elements (including communication links and the components that control the unmanned aircraft) that are required for the pilot in command to operate safely and efficiently. This includes, but is not limited to, any unmanned aircraft system that is designated as a "model aircraft" by the Federal Aviation Authority.

B. Policy. Personal use of UAS by University faculty, staff, students, or third parties on University property, including but not limited to recreational or hobby flight of model aircraft, is prohibited, except as approved by the Executive Director of the Office of Public Safety and Security. See also APM 35.35, Public Use and Liabilities.

Use of UAS in support of the educational, research, and service missions of the University is governed by APM 45.35, University of Idaho Unmanned Aircraft Systems, and may only occur consistent with approval granted by the University, as described therein.
A. General.

A-1. Preface. The University of Idaho ("University") encourages and welcomes the use of University facilities by the public and by organizations if used in an appropriate, safe, and responsible manner. While the University is a public institution, not all of its facilities are open to the public. The University has established this policy to allow the use of University facilities by the public while minimizing the risks and liabilities to the University and protecting University facilities from damage, vandalism, and abuse (see also Facilities Scheduling Policy Committee FSH 1640.40). [rev. 10-11]

A-2. University Facilities. University facilities include the buildings, structures, grounds, lawns, sports fields, golf course, sidewalks, and farm areas, and all improvements contained within the property boundaries of the University.

B. Correcting or Reporting Unsafe Conditions. Any University employee that observes a situation that exposes any person to an unsafe condition must immediately report the unsafe condition to his or her supervisor. The public is encouraged to report any unsafe condition to the Environmental Health and Safety Office ("EHS") at (208) 885-6524 or safety@uidaho.edu, Facilities at (208) 885-6246 or facilities@uidaho.edu, or, after normal business hours, Campus Security at (208) 885-7054. [ed. 7-10, 10-11, 1-14]

C. Accident Assistance and Reporting. Any University employee that observes an accident that involves bodily injury or creates a hazardous situation should immediately call the appropriate local emergency response number. The accident must then be reported to the Risk Management Office, (208) 885-7177 or risk@uidaho.edu, or, after normal business hours, Campus Security at (208) 885-7054, so that the circumstances of the accident can be documented and any necessary corrective action can be identified and taken. [rev. 10-11, 1-14]

D. Use of University Facilities.
D-1. **Facility and Space Reservations.** To schedule the use of any university facility, the approved venue locations, contact information, costs and other information can be found at the Facility and Space Reservations website at http://www.uidaho.edu/facilities/les/reservations. [rev. 10-11]

D-2. **Considerations of Use.** Persons responsible for organizing and conducting events in University facilities are expected to address the following as part of the planning process: a) Facility Use Agreement for use of space, (b) insurance; (c) developing and implementing procedures for reporting accidents and summoning aid; (d) security arrangements; (e) traffic control; (f) food services; and (g) sanitation requirements. At a minimum, Risk Management, Facilities, University Support Services, and Parking and Transportation Services (“PTS”) are involved in approval process. (See Facility and Space Reservations website for more information at http://www.uidaho.edu/facilities/les/reservations.) [rev. 10-11]

E. **Restricted Areas.** The public is not permitted in restricted areas on University property except with the permission of the appropriate University administrator. Restricted areas include, but are not limited to, non-public areas such as offices, classrooms, laboratories, shops, workplaces, roofs, mechanical spaces, construction areas, University operated residences and residential areas, swimming pools, weight rooms and athletic facilities, shooting ranges, animal facilities, various landscape areas and recreation fields, crop land, and forest lands. [rev. 10-11]

F. **Individual or Non-Sponsored Recreational Activities.** Individuals conducting recreational activities on University property are responsible and liable for their actions and for any damages caused. Any organized event must be approved by the venue administrator. Approved events take precedence over any unscheduled activities. Any violation of this policy should be reported to Campus Security at (208) 885-7054. [rev. 10-11, ed. 1-14]

F-1. **Types of Recreational Activities.** Many recreational activities such as kite flying, remote control model airplanes, cross-country skiing, group sports activities, and Frisbee/disc gold activities are permitted
only in certain areas. Other activities are banned completely, or restricted to supervised classes only, because of safety and damage concerns. See list below for further clarification. Sport fields may be used if scheduled with the Athletic Department or Campus Recreation. Recreational and group activities using other campus green spaces must be approved by Facilities. [rev. 10-11, 3-15]

F-2. Sledding, Snowboarding and Skiing. There are no areas on campus for downhill sledding, snowboarding, or skiing at this time. Please use Moscow City Parks or other appropriate areas for downhill sledding, skiing, and snowboarding.

F-3. Climbing and Rappelling Activities. Climbing or rappelling activities are not allowed, except for the Climbing Walls at the Student Recreation Center and Memorial Gym.

F-4. Frisbee/Disc Golf Activities. The University has constructed a disc golf course on campus. Information and maps of this golf course can be obtained from Campus Recreation http://www.campusrec.uidaho.edu/. Individuals using the disc golf course are responsible and liable for their actions, for any injuries to other persons, and for any property damage resulting from their activity. Disc play outside the disc golf course is not permitted. Other Frisbee team sports and catch are allowed only on the Theophilus Tower lawn, Wicks/Intramural fields, Sprint Turf field, North field, and Band field. Individuals are not permitted to climb onto buildings or roofs to retrieve their Frisbees/discs or other items. Requests to retrieve all items should be made to Facilities at (208) 885-6246 or facilities@uidaho.edu. [rev. 10-11]

F-5. Recreational Fires. [See APM 35.25] Recreational fires on University property must be a) approved by the EHS Office, (208) 885-6524, b) approved and a permit issued by the Moscow Fire Department, (208) 882-2831, and c) approved by Facilities, (208) 885-6246. These fires are strictly limited in scope and used for University-sanctioned events only. No personal campfires or cooking fires are allowed on campus. [rev. 10-11]
F-6. **Driving on Campus Green Space.** Driving any vehicle (cars, trucks, bikes, ATV’s, motorcycles, etc.) on campus green spaces for an event without prior permission from Facilities is not allowed. Protection of green space from rutting, tearing, and damage is critical. Proper use of protective materials is required before vehicles may be driven/parked on green space areas. Contact Facilities Landscape Department (208) 885-6734 or landscape@uidaho.edu for assistance. [Note: Non-event driving on University green space by anyone other than authorized service or emergency vehicles is prohibited at all times, and citations will be issued by the Moscow Police Department (“MPD”) for these violations.] [ed. 10-11]

F.7 **Tight Rope or Slack Line walking, tree climbing, and related activities.** Slack Line or Tight Rope walking and related activities are not permitted on campus. Campus property, including but not limited to trees & buildings, are not to be used for the purpose of anchors or poles to support cables and tightening devices being used for recreational activities or classes that include free climbing; tight rope walking; aerial cable slides or glides, or any other related activity. [add. 4-07, ed. 10-11]

Climbing trees for University-sponsored class work leading to a professional degree, such as an arboricultural class, is permitted during class sessions through special arrangements with the Facilities – Landscape Division. Only the Campus Horticulturist; the Campus Arborist; the Campus Landscape Superintendent; and the Landscape & Exteriors Services Director can authorize a particular tree or group of trees to be used for a University outdoor classroom event. Permission must be gained for such an event at least two (2) weeks prior to the event. [add. 4-07, ed. 10-11]

Trees selected by Landscape Staff will be reviewed against the type of event that is being planned, the number of people involved, and the expected negative impacts to the trees and landscape. Once these parameters have been determined, trees that will meet these needs with minimal damage will be assessed and visually checked for health; vigor; load capacity; and possible branch and root issues. Trees selected for the
event are based upon the trees’ ability to withstand and support the proposed event, not where the event coordinator would like to locate that event. [add. 4-07, ed. 10-11]

Trees that will not be allowed for this type of activity are iconic trees within the University landscape; unique specimen, species, or cultivars of trees on campus; historically or culturally significant campus trees; or campus trees that have received Memorial or Recognition status and have plaques by them. For example Camperdown Elms or any trees within the Administration Lawn would not be suitable candidates for an authorized outdoor classroom event. [add. 4-07]

For permission and/or any further questions, please contact Facilities at (208) 885-6246 or email at landscape@uidaho.edu. [add. 4-07, ed. 10-11]

G. **Bicycling, Skateboarding, and Rollerblading.**

G-1. **Bicycling.** The closed walkway systems and pedestrian areas on campus are considered sidewalks for the purposes of bicycle safety and enforcement. . [ed. 10-11, 1-14]

a. Bicycles may not be brought into University general education buildings. Violations of this policy should be reported to the EHS Office, (208) 885-6524. [add. 10-11]

b. Bicycle parking is provided throughout the University campus and bicycles may only be parked in accordance with APM 40.32 A-6. [rev. 10-11, 1-14]

c. Abandoned and disabled bicycles are handled in accordance with APM 40.32 A-6. [rev. 10-11, 1-14]

d. More information on the University’s bicycle rules and regulations is available on the Parking and Transportation Services website: http://www.uidaho.edu/parking/rules-and-regulations/l,-d-,bicycles. [rev. 1-14]

G-2. **Skateboarding and Roller Blading.** [ed. 7-10]
a. University facilities are not open to skateboarders or rollerbladers other than currently enrolled University students or University employees. University students and employees wishing to use their skateboards or rollerblades as transportation around campus may do so on any walkway wider than eight (8) feet. Safety and congestion problems occur when using walkways that are eight (8) feet or less. [rev. & ren. 10-11]

b. Skateboarding or rollerblading in a manner that may cause injury to self or others is not permitted on University property. [ren. 10-11]

c. Skateboarders and rollerbladers must yield to pedestrians at all times. [ren. 10-11]

d. Recreational skateboarding or rollerblading where jumps, tricks, or other maneuvers are performed is not allowed anywhere on the University campus. Please use Moscow Skate Park for these types of activities. The University campus is considered “off limits” for all recreational skateboarding. [rev. & ren. 10-11]

e. Waxing, grinding, permanent or semi-permanent surface markings, or damage to University property not applied by authorized University representatives is prohibited in all areas. University considers such activity to be defacing/vandalizing state property and will have MPD issue citations as needed. [rev. & ren. 10-11]

f. The University will pursue restitution for expenses for the cleanup, repair or replacement of any damage caused by persons who are skateboarding or rollerblading.

g. The University supports citing for trespass, as the police officer deems appropriate and applicable, any individual found skateboarding or rollerblading in violation of University policy. [rev. 10-11]

h. The University assumes no liability for injury caused by skateboarders or rollerbladers. Persons
who skateboard or rollerblade on University property, or their parents in the case of minors, are solely and totally responsible for any injuries to self and others that result from their skateboarding or rollerblading activities. [rev. 10-11]

H. Weapons and Explosives.


H-2. Explosives. [ren. 1-15]

a. Explosives include but are not limited to any chemical compound, mixture, or device, the primary or common purpose of which is to function by explosion. The term includes, but is not limited to, dynamite and other high explosives, black powder, pellet powder, initiating explosives, detonators, safety fuses, squibs, detonating cord, igniter cord, and igniters.

b. Except in the case of law enforcement officers engaged in official duties, explosive substances are prohibited on university premises unless the Executive Director of the Office of Public Safety and Security (OPSS) approves their use. [ed. 1-14, ren. 7-14]

H-3. Violations of the Weapons and Explosives Policy. Anyone who has concerns about possible violations of this policy should notify the Executive Director of OPSS at (208) 885-7209. [ed. 1-14, ren. 7-14]

a. Employees who violate this policy are subject to disciplinary action, up to and including dismissal.

b. Students who violate this policy are subject to disciplinary action, up to an including expulsion, as outlined in the Student Code of Conduct.

I. Aircraft Use and Parachute Jumps.

I-1. Aircraft Use. The landing or use of aircraft (helicopters, ultra lights, hang gliders, unmanned aircraft systems, etc.) on University property is
prohibited except as approved by the Executive Director of OPSS. See APM 95.35. [ed. 10-11, 1-14, rev. 3-15]

I-2. Parachute Jumps. Parachute jumps, including skydiving, onto University property are prohibited. [ed. 10-11]

J. Dogs and Other Animals. See APM 95.16, Animals on Campus. [rev. 1-15]

K. Overnight Camping on Campus. Overnight camping on the University campus is prohibited unless authorized by Parking and Transportation Services (PTS), Facilities, or its designee for a University sponsored event. This privilege is extended only to persons attending University-sponsored activities (e.g., athletic events, short courses, Family Weekend, and/or Homecoming, etc.) and granted only for self-contained recreational vehicles (“RVs”). Unauthorized camping is considered a trespass on University property and is enforceable by MPD. The following guidelines explain allowable and unallowable procedures for overnight RV camping on University property. [rev. 10-11, ed. 1-14]

K-1. Designated Camping Areas. Authorized RV overnight camping is only allowed in parking lot 110 (west of the Kibbie-ASUI Activity Center, north of the all weather track and lot 57). Prior authorization from PTS is required. [rev. 10-11]

K-2. Open Fires Prohibited. Open fires are strictly prohibited. [ren. 10-11]

K-3. Camping Trash Collection. Trash and/or debris disposal should be made only in the designated trash receptacles for the sponsored events. [ren. 10-11]

K-4. Information. For additional information or questions regarding overnight RV camping on University property, please contact Parking and Transportation Services (PTS) at (208) 885-6424. [rev. & ren. 10-11, ed. 1-14]
GPA Requirement for Graduation

Current Language

**Grade Requirements.** In order to be eligible for graduation, a candidate for an advanced degree must have a cumulative GPA, based on all grades on his or her graduate transcript, of at least 3.00 (A = 4.00). The relevant GPA is calculated as stated in regulation E. Courses in which grades of D or F are received may not be counted toward the satisfaction of degree requirements; however, those grades are included in the GPA.

Revised Language

**Grade Requirements.** In order to be eligible for graduation, a candidate for an advanced degree must have a cumulative GPA, based on all grades on his or her graduate transcript, of at least 3.00 (A = 4.00) and at least a 3.0 overall GPA across all courses listed on the approved study plan. The relevant GPA is calculated as stated in regulation E. Courses in which grades of D or F are received may not be counted toward the satisfaction of degree requirements; however, those grades are included in the GPA.
Undergraduate Enrollment in the College of Graduate Studies

A senior [90 or more credits] who has a cumulative grade-point average of 3.00 or higher may register for courses at the 500-level courses. Graduate courses taken as an undergraduate student Courses will automatically be recorded on the undergraduate transcript. However, seniors Students desiring to have graduate level courses taken as an undergraduate placed on a graduate transcript must follow the policies on reserving courses for the graduate transcript. If the credit reservation form is approved, a separate graduate transcript will be created for the student. Capable students who are in their senior year can thus begin limited graduate work at an earlier date than would otherwise be possible. submit to and have approved by the College of Graduate Studies a "Course Level Adjustment Form" that specifies the courses to be placed on the graduate transcript, thereby allowing a separate graduate transcript to be established. Capable students who are in their last year can thus begin limited graduate work, up to a total of 12 credits, at an earlier date than would otherwise be possible. The Course Level Adjustment Form must be processed and accepted by COGS prior to the student applying for the bachelors degree. No courses will be moved to the graduate transcript once the baccalaureate degree is awarded. Students who have courses placed on a graduate transcript and later wish to be admitted to the College of Graduate Studies for work toward a degree must apply for admission to the College of Graduate Studies following the usual procedures. All courses placed on the graduate transcript, regardless of course level, will be assessed graduate fees.

Reserving Undergraduate Courses for the Graduate Transcript

Students desiring to move courses from their undergraduate transcript to a graduate transcript may do so by filing the Credit Reservation Form with the College of Graduate Studies. Courses from the undergraduate record may be moved to a graduate transcript if they meet the following criteria 1) the student has a cumulative GPA of 3.00 or greater; 2) the course is at the 400 level or higher; 3) the grade in the course is A or B; 4) the course was not used to meet the requirements for the undergraduate degree. No more than 12 credits of undergraduate work can be moved to the graduate transcript under this policy.

Students are responsible to initiate the course reservation process as soon as they know they wish to move a course to the graduate level and prior to receiving their baccalaureate degree. No courses will be moved to the graduate transcript once the baccalaureate degree has been conferred. Undergraduate courses completed at another institution are not eligible to be reserved. Courses will not be reserved until final grades for the term have been posted. Students who have courses placed on a graduate transcript and later wish to be admitted to the College of Graduate Studies for work toward an advanced degree must apply for admission to the College of Graduate Studies following the usual procedures. All courses placed on the graduate transcript, regardless of course level, will be assessed graduate fees.
TO: University Curriculum Committee
FROM: Graduate Council
RE: Regulation O-10 [Effective: Summer 2016]
DATE: April 1, 2015

O-10. Academic Certificates. The University of Idaho offers Academic Certificates in various academic disciplines. An academic certificate is defined as a coherent body of work designed to reflect specialized expertise. The curricular requirements of an academic certificate can be found in the relevant department in the catalog.

O-10-a. Undergraduate Academic Certificates.
1. An undergraduate academic certificate must include at least 12 credits of coursework.
2. All required coursework must be completed with a grade of "C" or better unless the certificate specifies a higher grade requirement.
3. A maximum of six credits of coursework which is either transferred from another regionally accredited institution or is more than five years old at the time of graduation may be used towards completion of an academic certificate.

O-10-b. Graduate Academic Certificates.
1. A graduate academic certificate must include at least 12 credits of coursework. At least half of the required credits completed towards a graduate academic certificate must be in graduate level coursework.
2. All required coursework must be completed with a grade of "B" or better unless the certificate specifies a higher grade requirement.
3. A maximum of six credits of coursework which is either transferred from another regionally accredited institution or is more than five years old at the time of graduation may be used towards completion of an academic certificate.