



# **BOARD OF TRUSTEES OF THE UNIVERSITY OF OREGON**

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**POLICIES ON TUITION, MANDATORY  
ENROLLMENT FEES AND OTHER CHARGES,  
FINES, AND FEES**

**2016-17 ACADEMIC YEAR**

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**2017 SUMMER SESSION**

Approved by the Board of Trustees of the University of Oregon on March 4, 2016

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# AUTHORITY

## Board of Trustees of the University of Oregon

Under ORS 352.102, the Board of Trustees (Trustees or Board) may authorize, establish, eliminate, collect, manage, use in any manner and expend all revenue derived from tuition and mandatory enrollment fees.

In determining tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition, the Trustees may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the Board first receives approval from the Higher Education Coordinating Commission or the Legislative Assembly.

Under ORS 352.105, the Board will also collect mandatory Incidental Fees upon the request of the ASUO under a process established by the ASUO in consultation with the Trustees. Mandatory Incidental Fees collected by the Board will be allocated by the recognized student government. The mandatory Incidental Fee proposed by the ASUO, uses of the fee or decision to modify an existing fee may be refused by the Board of Trustees or the University President if one determines that:

- The recognized student government assessed or allocated the mandatory incidental fees in violation of applicable local, state or federal law;
- The allocation conflicts with a preexisting contractual financial commitment;
- The total mandatory incidental fees budget is an increase of more than five percent over the level of the previous year; or
- The fee request is not advantageous to the cultural or physical development of students.

Under ORS 352.107(1)(d), the Board may establish, collect and use charges, fines and fees for services, facilities, operations and programs. This provision does not cover tuition and mandatory enrollment fees or incidental fees, but it covers every other charge, fine or fee that could be established.

## TUITION AND FEE POLICIES FOR 2016-17

### Tuition

Tuition for students enrolled in a program is established based on state-appropriated funds per full-time equivalent student, the financial needs of the University, market comparators, student classification (including, but not limited to, undergraduate, graduate and doctoral), residency, credit hours taken, degree program, and other factors. In determining tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board of Trustees may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the board first receives approval from:
  - a) The Higher Education Coordinating Commission; or
  - b) The Legislative Assembly.
  
- (2) The Board of Trustees shall attempt to limit annual increases in tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon to a percentage that is not greater than the percentage increase in the Higher Education Price Index, as compiled by the Commonfund Institute.

The Board of Trustees may not delegate authority to determine tuition for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition. Revenues derived from tuition may be managed and used in any manner.

Tuition may be established for any University program and may vary by regular academic year, summer session, continuing education programs, and other programs.

- **Academic Year:** Charges assessed to students during the academic year are comprised of tuition, mandatory enrollment fees, and all other student fees. During the regular academic year, tuition and fees are assessed based on the student's classification level, regardless of course level.
  
- **Summer Session:** For summer session programs, tuition is typically assessed on a per-credit hour basis or aligned to the preceding academic year's structure. The University may choose to make a residency determination for summer term. Tuition rates in the summer session may differ from the academic year. During the summer, non-admitted, part-time students enrolling for a combination of undergraduate and graduate courses are assessed tuition using the rates for each respective classification and fees based on the undergraduate fee tables for total enrolled credits.
  
- **Continuing Education:** Generally, rates are set no lower than necessary to cover direct plus indirect costs.

## Fees

### Mandatory Enrollment Fees

A fee is a mandatory enrollment fee if it is required to be paid as a condition of enrollment in the University by every enrolled student. In determining mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition:

- (1) The Board of Trustees may not increase the total of tuition and mandatory enrollment fees by more than five percent annually unless the board first receives approval from:
  - a) The Higher Education Coordinating Commission; or
  - b) The Legislative Assembly.
  
- (2) The Board of Trustees shall attempt to limit annual increases in tuition and mandatory enrollment fees for undergraduate students who are enrolled in a degree program and have established residency in Oregon to a percentage that is not greater than the percentage increase in the Higher Education Price Index, as compiled by the Commonfund Institute.

The Board of Trustees may not delegate authority to determine mandatory enrollment fees for undergraduate students who are enrolled in a degree program and are qualified to pay resident tuition. For Academic Year 2016-17, mandatory enrollment fees are the Building, Health Service, Incidental, Recreation Center and Student Union Fees. The University has the option of assessing mandatory enrollment fees during the summer session at rates comparable to those assessed in the academic year.

1. **Building Fee:** The Building Fee is used to fund the construction and provide debt service for capital projects, primarily those associated with student centers, health centers, and recreational facilities.
  
- **Incidental Fee:** Incidental Fee recommendations for Academic Year 2016-17 were approved by student committees and forwarded to the President of the University for endorsement in accordance with UO Policy 580.010.0080-90. Students enrolled in off-campus programs (OIMB and Portland only) are assessed 50% of the Incidental fee.
  
- **Health Services Fee:** The Health Service Fee is used to support student health and counseling services. Students enrolled in the UO Portland programs use the Portland State University Student Health Center, and pay the same Health Service Fee as PSU students.
  
- **Recreation Center Fees; Student Union Fee:** The Recreation Center Fee and the Student Union Fee are used to fund the construction, debt service, maintenance, and operation costs of the student centers.

## Student Residency

A resident student is one who fulfills requirements established by the Inter-Institutional Residency Compact between and among the seven public universities in Oregon. Graduate students who have a teaching, research, or administrative Graduate Teaching Fellowship or are supported by an eligible training grant or graduate fellowship are converted to resident status for tuition and fee purposes.

## All Other Fees

Other fees include all charges, fines and fees that are neither tuition nor mandatory enrollment fees. The Board of Trustees, the President, or designee may establish these fees and use them for services, facilities, operations, and programs.

- **The Matriculation Fee:** The Matriculation Fee is a one-time fee charged to newly admitted students upon enrollment. This fee is a one-time assessment and was developed to reduce the large number of enrollment-related fees for course scheduling (drop/add fees), transcripts, degree applications, and re-enrollment. The fees are also used to support academic programming for freshman interest groups and learning communities. The University does not charge students for placement exams for regular academic courses
- **Undergraduate International Student Fee:** The University sets the international student services fee to provide a set of services and programming to support international students. The fee supports services related to academic support; enrollment services; increased immigration compliance and reporting as required by the federal government (such as SEVIS II); personal and cultural counseling and advising; and accelerated planning and delivery of new programs.
- **Laboratory and Course Fees:** Laboratory and course fees must be published. Generally, laboratory and course fees are limited to fees for equipment, materials, or ancillary services consumed by the student as a part of course instruction where the equipment or material is not readily available for purchase through a private source.
- **Other Charges, Fees and Fines for Services, Facilities, Operations and Programs:** The level of charges, fines and fees should be at least sufficient to ensure recovery associated direct and indirect costs. Some charges, fines and fees may be established at a level to deter conduct that is contrary to University policies and standards or applicable law. Charges, fees and fines are for purposes such as the following: auxiliary services such as housing, food services, and parking; use of facilities; athletics and other tickets and events; and violation of policies and standards, such as late fines for library books and parking fines.
- **Application Fee:** The President or designee determines application fees. The University may assess greater application fees for admission to selected programs or schools. The relevant application fee must be received before the application will be evaluated. Application fees are not refundable.

**Undergraduate Application Fee Waiver Program:** The President or designee may, upon request, waive the application fee for first-time freshmen or transfer students who, at the time of application, demonstrate high financial need, as evidenced by:

- Participation in a free or reduced school lunch program;
- Pell-eligible status provided on FAFSA-related documents;
- Involvement in TRIO-type college preparatory programs (e.g., Upward Bound, Talent Search, EOC, HEP);
- State of Oregon or U.S. public assistance; College Board fee waiver; or
- Submission of a College Board, NACAC, or Foster Youth Tuition and Fee waiver; or
- Other factors illustrating financial hardship, at the discretion of the Office of Admissions.

No applicant will be granted a fee waiver unless they are determined to have genuine financial need. Prospective students who are classified as international applicants are not eligible for an application fee waiver. However, undocumented Oregon high school students who are potentially eligible for the state's Tuition Equity Program can be granted a waiver on a case-by-case basis. The Office of Admissions administers the application fee waiver program, and its Director may add, remove or modify methods of confirmation as needed over time.

To request an application for Application Fee waiver, go to:

<http://admissions.uoregon.edu/counselors/feedeferral>.

The student must complete the form and, as appropriate, obtain needed signatures to confirm her/his status.

**Graduate Application Fee Waiver:** A limited number of waivers of the graduate application fee are available for graduate applicants who are:

- An admitted graduate student or an applicant that has already paid the UO graduate admission application fee for the same academic year ;
- An employee eligible for staff tuition rates;
- A participant in an undergraduate research program for minority students;
- A participant in a service-based organization such as the Peace Corps;
- Active member, reservist or veteran of the U.S. armed services;
- Eligible for a waiver on the basis of financial need.

The Graduate School administers the graduate application fee waiver program. Applicants may request a waiver as part of the online application for Graduate School admission.

## **Post-baccalaureate, Non-graduate Student Classification**

A holder of an accredited baccalaureate degree who has not been admitted to a graduate degree program and who submits an official application for admission to pursue a second baccalaureate degree or enroll in course work not to be used for credit toward a graduate degree is called a *post baccalaureate, non-graduate student* and is assessed tuition at undergraduate rates. Baccalaureate degree holders who are not admitted to post baccalaureate, non-graduate status will be assessed graduate tuition rates.

Baccalaureate degree holders who are admitted to post baccalaureate, non-graduate status are ineligible for graduate credits taken while in this status. However, in individual cases, the University may allow the reservation of credits toward the University's graduate programs. Graduate credits reserved in combination as an undergraduate and post baccalaureate, non-graduate may not exceed 15 credits.

Students who are admitted to an advanced degree program may convert to post baccalaureate, non-graduate student status with voluntary relinquishment of graduate status upon approval of the Graduate School, but only if the student has not been disqualified from the advanced degree program for academic or conduct reasons.



Students who are admitted to a graduate certificate program are not eligible for the post baccalaureate, non-graduate student status. Graduate tuition rates apply.

## SCHOLARSHIP AND TUITION REMISSION POLICIES

The University's commitment to the 40-40-20 goal described in ORS.009 is achieved through an array of scholarship and financial aid programs and policies. These programs and policies promote the University's goals of providing accessibility to high-quality higher education.

### Student Financial Aid Programs

The combined aid for a student may not exceed the cost of attendance for that student, except as approved by the President or designee. The university's student financial aid offerings are comprised of programs similar to others offered across the country (often referred to as "fee waivers" or "tuition discounts") enhanced by initiatives specific to the University or the state of Oregon. As an enrollment management tool, programmatic student aid allows the University to target specific campus enrollment goals including recruitment of needy or meritorious students, international students, athletes, and other student populations. The following are summaries of University student financial aid programs:

### Diversity Programs

- **University of Oregon Diversity Initiatives**
  - *Criteria:* These initiatives are open to all admitted students, resident or nonresident, undergraduate, graduate, or law. The programs may consider different factors in making awards and may offer financial aid programs that support the University's commitment to diversity and supports its educational mission.
  - *Awards:* The University may make partial or full scholarships based on need or to expand the number of students who receive at least some funding support. Awards are specific to the University of Oregon, and students may not take a scholarship with them if they move to another institution.

### International Recruitment Programs

- **International Fee Remission Program**
  - *Criteria:* This program is for admitted undergraduate or graduate students with international student status.

- *Awards:* Awards may vary in amount but cannot exceed the total amount of the fee. The University has the option to remit all or a portion of this fee.

- **Cultural Service Program**

- *Criteria:* This program is for admitted undergraduate or graduate students with international student status who: are competitively selected on the basis of academically meritorious achievement; and fulfill the community service requirements of the program while receiving the award.
- *Awards:* Awards may vary in amount but cannot exceed the total nonresident undergraduate or graduate tuition and mandatory enrollment fees. Remission of mandatory enrollment fees is at the University's option.

### **International Exchanges**

- **IE3 Global Programs**

- *Criteria:* This program is for students who are attending University of Oregon as a part of an exchange program managed by IE3 Global and approved by the University of Oregon.
- *Awards:* Awards may consist of remission of all or some of the Enrollment Fees, depending upon the reciprocal agreement under which the student is enrolled.

### **Contract and Grant**

- **Contract and Grant: Academic Year**

- *Criteria:* This provision is for students who participate in specific courses or programs during the academic year funded by grant or contract with an outside agency or firm.
- *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency.

- **Contract and Grant: Summer Session**

- *Criteria:* This provision is for students who participate in specific courses or programs during the summer session funded by grant or contract with an outside agency or firm.
- *Awards:* Awards are generally for remission of tuition only, depending upon agreement with the granting agency.

## University of Oregon Tuition Grant

- *Criteria:* The University of Oregon Tuition Grant is a need-based tuition grant program available to qualified Oregon resident undergraduates.
- *Awards:* These supplemental tuition grants may not exceed the total Tuition assessed for the regular academic year.

## Veteran Fee Remissions

### VOYAGER Fee Remission

The Voyager Tuition Assistance Program (Voyager) was implemented in the Fall of 2005 in response to a direct gubernatorial request and is intended for National Guard and Reservists who have been in an area of hostility since 9/11.

- *Criteria:* The VOYAGER fee remissions are for Oregon residents who are members of the National Guard or Reserves and were deployed in an area of military combat since September 11, 2001. This fee remission is for full-time students pursuing their initial bachelor's degree. Students must submit a Free Application for Federal Student Aid annually and continue to maintain satisfactory academic progress to maintain eligibility.
- *Awards:* Award is the difference between the National Guard and Reserves tuition benefit of \$4,500 or the VA Chapter 33 Tuition Fee benefit and total enrollment fees. Students are responsible for securing the National Guard or Reserves tuition benefit. Duration of the VOYAGER award is four years excepting those five-year degree programs as documented in the University of Oregon catalog. Students are not eligible for the award once they earn fifteen credits above the minimum number of credits required by the degree.

### Veterans' Dependent Tuition Waiver

- *Criteria:* The Veterans' Dependent tuition waiver is for qualified students admitted to a baccalaureate or master's degree program. A qualified student is a child (includes adopted child or stepchild), spouse or an surviving spouse who has not remarried of a service member or a child of a Purple Heart recipient.
  - The service member is one who:
    - Died on active duty;
    - Has a 100% service-connected disability rating as certified by the United States Department of Veterans Affairs or by any branch of the Armed Forces of the United States; or
    - Died as a result of a military service-connected disability.

- The Purple Heart recipient is a person, alive or deceased, who:
      - Was relieved or discharged from service in the Armed Forces of the United States with either an honorable discharge or a general discharge under honorable conditions; and
      - Was awarded the Purple Heart in 2001 or thereafter for wounds received in combat.
- An eligible child must be 23 years of age or younger at the time the child applies for the waiver. A child who is older than 23 years of age is eligible for a waiver for a master's degree program if the child:
  - Applied for and received a waiver for a baccalaureate degree when the child was 23 years of age or younger; and
  - Applied for a master's program waiver within 12 months of receiving a baccalaureate degree.

The qualifying student must meet Oregon residency requirements.

- *Awards:* The award may be granted for credit hours for courses that are offered at the University of Oregon. The award does not cover other mandatory enrollment and course specific fees. The maximum waiver granted under this remission program shall be:
  - The total number of attempted credit hours equal to four years of full-time attendance for a baccalaureate degree; and
  - The total number of attempted credit hours equal to two years of full-time attendance for a master's degree.
- Notwithstanding sections 1 and 2 of this paragraph, a waiver may not exceed the total number of credit hours the qualified student needs to graduate with a baccalaureate or a master's degree. Transferred credit hours accepted for a degree program may or may not count toward the total credit hours needed for degree completion.
  1. The amount of tuition waived may be reduced by the amount of any federal aid scholarships or grants, awards from the Oregon Opportunity Grant program established under ORS 348.205, or any other aid from the eligible post-secondary institution, received by the qualified student.
  2. The amount of tuition waived may not be reduced by the amount of any Survivors' and Dependents' Educational Assistance under 38 U.S.C. Chapter 35 paid to a qualified student.
  3. Awards to children of Purple Heart recipients apply only to students admitted as new but not continuing for Fall 2013 or thereafter.
  4. Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

## Nonresident Veteran Resident Tuition

The Nonresident Veteran Resident Tuition is a tuition reduction for qualified students who are not Oregon residents and who are attending classes as an admitted undergraduate or graduate student at the university if the student:

- Served in the Armed Forces of the United States;
  - Was relieved or discharged from that service with either an honorable discharge or a general discharge under honorable conditions as shown on an original or certified copy of the student's DD-214; and
  - Provides proof that the student has established a physical presence in Oregon within 12 months of being enrolled at the University of Oregon.
- *Award:* Qualified students admitted as new but not continuing undergraduate students for the Fall 2013 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:
- A student who served in the Armed Forces of the United States *and* who receives federal tuition benefits in excess of the tuition and fees charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.
  - Distance education and self-support courses as identified by the University are excluded from this discount.
  - If a nonresident student is otherwise eligible for tuition benefits under this discount and receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the University of Oregon.

Qualified graduate students admitted as new but not continuing graduate students for the Fall 2014 term or later are charged tuition and fees no greater than the resident rate with the following listed qualifications:

- A student who served in the Armed Forces of the United States *and* who receives federal tuition benefits in excess of the tuition and fees charged under this policy shall pay tuition and fees equal to the federal tuition benefits received.
- Distance education and self-support courses as identified by the University are excluded from this discount.
- If a nonresident student is otherwise eligible for tuition benefits under this discount and receiving federal vocational rehabilitation education benefits, that student shall pay full nonresident tuition and fees charged by the University of Oregon.

## Foster Youth Tuition Waiver

The Foster Youth Tuition and Fee Waiver originated with the passage of HB 3471 in the 2011 Regular Session of the Oregon Legislative Assembly and is intended to “increase access to higher education for current and former foster children by providing a Tuition and Fee Waiver” to minimize the amount of tuition absorbed by the student. It was further amended by HB 2095 in the 2013 Regular Session to align the definition of “former foster youth” with the federal standard.

- *Criteria* : The Foster Youth Tuition and Fee Waiver is open to qualified current and former foster children enrolled as undergraduate students within the University for the purposes of pursuing an initial undergraduate degree (as evidenced by admission into an undergraduate degree program). This program waives tuition and fees for current and former foster youth who enroll prior to reaching 25 years of age until the student receives “the equivalent of four years of undergraduate education.”
- To qualify for the program, the student must:
  - Have spent at least 180 days in substitute care after age 14, was not dismissed from care prior to reaching 16 years of age and either left foster care (had ward ship terminated) or completed high school/GED within the previous 3 years; and
  - Be admitted to an undergraduate degree program and enroll prior to reaching 25 years of age; and
  - Submit a completed FAFSA (Free Application for Federal Student Aid) for each academic year he/she is eligible for the program; and
  - For years after the first academic year at an institution of higher education, have completed a minimum of 30 volunteer service hours in the previous academic year performing community service activities such as mentoring foster youth or assisting in the provision of peer support service activities, according to policies developed by the institution of higher education at which the current or former foster child is enrolled.
- *Awards*:
  1. A qualified student for The Foster Youth Tuition and Fee Waiver is entitled to waiver of tuition and fees as noted below:
    - a. Tuition for academic credit courses (at base or differential rates depending upon program to which student is admitted) but not for noncredit courses.
    - b. Mandatory enrollment fees: building, incidental, health service, recreation center, or other mandatory fees that may be added from time to time.
    - c. Fees required for instruction related services such as lab or course fees that are assessed upon registration for a particular course.
    - d. The waiver excludes all other charges, fees and fines for such as residence hall room and board, dining services, parking fees and fines, library fines, etc. In addition, text books and other course materials not assessed as part of a course fee are also excluded. Fees considered as “pass through” fees, paid to an outside provider, are exempt from the Tuition and Fee Waiver.

2. Eligible students may receive the Foster Youth Tuition and Fee Waiver for up to 12 terms of full-time study or the equivalent. Attendance at less than full-time will be prorated accordingly.
3. If a student meets all other criteria for eligibility, but does not require the Foster Youth Tuition and Fee Waiver, the student shall remain eligible until the student receives the equivalent of 4 years of undergraduate education.
4. As noted previously, to be considered eligible for this program, the student must complete and submit a FAFSA for each academic year they are eligible for the program. Awards made under The Foster Youth Tuition and Fee Waiver shall be applied after the following:
  - a. Any federal Pell or Supplemental Educational Opportunity Grants (SEOG)
  - b. Oregon Opportunity Grant established under ORS 384.205
  - c. Any other gift, grant or scholarship received from the institution of higher education which may be applied to the tuition and fees covered under this program.
5. For purposes of this program, non-tuition scholarships from sources outside of the University, which pass through either OSAC or the institution, are not included in the calculation of the tuition and fee waiver award amount.

*Definition of Terms:* For purposes of this waiver, the following terms are defined as follows: A “former foster child” is defined as an individual who, for a total of six or more months while between 14 and 21 years of age, was:

- A ward of the court pursuant to ORS 419B.100(1)(b) to (e) and in the legal custody of the Oregon Department of Human Services (or one of the nine federally recognized Tribes in Oregon) for out-of-home placement and not dismissed from care before reaching 16 years of age; or
- An Indian child subject to the Indian Child Welfare Act (25 U.S.C. 1901 et seq.), under the jurisdiction of a tribal court for out-of-home placement and not dismissed from care before reaching 16 years of age.

The “equivalent of 4 years of undergraduate education” and “equivalent of 4 academic years” is defined as up to 12 terms of full time study or the equivalent. Attendance at less than full-time will be prorated, accordingly.

Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

## **Tuition Equity**

The 2013 Oregon Legislature passed the OUS-supported Tuition Equity Act. The Tuition Equity Act, as outlined in House Bill 2787 (2013), became law on April 2, 2013, and exempts the following students from paying nonresident tuition and fees for enrollment in Oregon’s public universities:

1. Students who are not citizens or lawful permanent residents of the United States provided the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in Oregon;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia or the Commonwealth of Puerto Rico;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a high school in this state or received the equivalent of a high school diploma (such as a GED); and
  - d. Shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
  - e. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
  - f. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.
2. Students who are financially dependent upon a person who is not a citizen or a lawful permanent resident of the United States if the student:
  - a. During each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in this state and resided in this state with the person upon whom the student is dependent;
  - b. During each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia or the Commonwealth of Puerto Rico and resided with the person upon whom the student is dependent;
  - c. No more than three years before initially enrolling in an Oregon public university, received a high school diploma from a secondary school in this state or received the equivalent of a high school diploma.
3. For a student who is not already a citizen or lawful permanent resident of the United States, shows intention to become a citizen or a lawful permanent resident of the United States by submitting to the public university the student attends or plans to attend:
  - a. An official copy of the student's application to register with a federal immigration program or federal deportation deferral program or a statement of intent that the student will seek to obtain citizenship as permitted under federal law; and
  - b. An affidavit stating that the student has applied for a federal individual taxpayer identification number or other official federal identification document.

A student will continue to qualify for exemption from nonresident tuition and fees (e.g., be able to pay in-state tuition rates) under subsection (1) or (2) above for five years after initial enrollment.



A student who is a citizen or a lawful permanent resident of the United States and who has resided outside of Oregon for more than three years while serving in the Armed Forces of the United States, but who otherwise meets the requirements of subsection (1) or (2) above, shall qualify for exemption from nonresident tuition and fees for enrollment in a public university listed in ORS 352.002 without having to reestablish residency in Oregon.

Please, visit the University of Oregon webpage at <http://brp.uoregon.edu/special-fees-fines-book> for additional program information and application process.

## Other Financial Aid Programs

The University may create other individual financial aid programs to address enrollment management and financial aid program needs.

- *Criteria:* The University of Oregon scholarship programs are merit and/or need based awards that support the mission and goals of the University. These scholarships assist in the recruitment and retention of students.
- *Awards:* Scholarship amounts and eligibility criteria may vary across programs, and across academic years. These programs will be reviewed periodically to ensure that they continue to support the University's enrollment goals. Both resident and nonresident undergraduates will be eligible to receive funds under this program, with award amounts differing due to the difference in tuition for these groups of students. For programs where need is a consideration, use of the FAFSA data will also be considered in determining award eligibility.

## Reduced Tuition Benefit for Academic and Classified Employees

### Reduced Tuition Benefit for Employees

This benefit is also known as the "staff fee" privilege.

*Rates:* The rate for employees is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. The staff fee rate will be charged at the "regular" (not differential) resident undergraduate tuition rate for employees enrolled in either undergraduate or graduate programs, up to twelve credits per term.

*Fees:* Charges for mandatory enrollment fees do not apply for employees using the benefit; nor are employees entitled to health services or incidental fee services through this program. No Application Fee is required for employees and no other deposit is required when registering for classes. Other fees such as lab or course fees are assessed at the full rate and no discount is provided.

*Employee Eligibility:* On approval of the president or designee and with the concurrence of the employee's immediate supervisor, employees appointed at half-time (.5 FTE) or more are eligible. To

qualify for this fee, the employee must meet these eligibility criteria no later than the first day of classes of the term of enrollment.

For purposes of this benefit, the term “employee” may include persons with full-time courtesy appointments who provide a benefit to the institution in the form of teaching, research, or counseling, under the direction of the institution and using the facilities of the institution.

Retired employees and employees on leave are eligible for staff fee privileges. Subject to the approval of the president or designee of the teaching institution, the maximum credit limitation may be waived for retired employees and for employees on leave. See exception under Senior Citizen Tuition.

Employees on furlough or lay-off status may be eligible for staff fees in accordance with provisions of a collective bargaining agreement.

The staff fee is not available to temporary classified employees or student employees, including graduate assistants.

*Institutional Eligibility:* The benefit may be used at any Oregon four-year public institution. Employees who use the staff fee for courses away from their home institution are subject to staff fee policies and procedures of the instructing institution.

*Excluded UO Programs:* Staff fees are not applicable to self-support courses or to courses in excluded UO programs. Excluded programs are determined at the discretion of the President and the notice of exclusion must be filed with Human Resources office prior to the first day of registration for a term. 2016-17 excluded programs are:

1. Self-support courses
2. Law Program
3. Law — Conflict and Dispute Resolution (CRES)
4. Law — Environmental and Natural Resources
5. Journalism Portland Program — Strategic Communication Masters
6. Journalism Portland Program — Multimedia Journalism
7. Oregon Executive MBA
8. Applied Information Management (AIM)
9. Clark Honors College – Differential Tuition Only

*12-Credit Limit and Tuition Plateaus:* The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. See exception for retired employees and employees on leave, Section (d) of OAR580-022-0030. For more information please go to:

<http://brp.uoregon.edu/special-fees-fines-book>. Employees enrolled for more than 12 credits in one term will pay for each additional credit at the campus published “each additional credit” tuition rate applicable to resident undergraduate or graduate students, depending upon the degree status of the employee (or family member in the case of the Reduced Tuition Benefit for Family Members and Domestic Partners of Employees). Under this benefit, there is no tuition plateau for employees using the staff fee for graduate courses; there is no fee plateau at any campus for employees, family and dependents, or retired staff.

*Auditing:* No tuition shall be assessed to courses enrolled in by employees with a grading option of 'audit'. Attendance under such condition must be with the instructor's consent and on a space-available basis. The University of Oregon maintains a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged the staff fee rate or regular tuition, and may be used in addition to courses taken using the staff fee privilege during a term. However, any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the employee. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Family Members and Domestic Partners of Employees.

## **Reduced Tuition Benefit for Family Members of Employees**

To improve the recruitment and retention of high quality faculty and staff, the staff fee privilege may be transferred to a qualified family member such as a spouse, domestic partner or dependent child, on a limited basis. Only one (two, if the staff member is unclassified) staff member, spouse, domestic partner or dependent may use the staff fee benefit per term or semester. The benefit may not be subdivided among family members during a single term.

To qualify for this benefit, both the family member and employee must meet the eligibility criteria below no later than two weeks prior to the first day of classes of the term of enrollment.

*Rates:* The rate for family members is 30% of resident undergraduate tuition assessed at the teaching institution, rounded to the nearest dollar. The staff fee rate will be charged at the "regular" (not differential) resident undergraduate tuition rate for family members enrolled in either undergraduate or graduate programs, up to twelve credits per term.

*Fees:* The family member to whom the benefit is transferred is responsible for all mandatory enrollment fees in addition to laboratory/course fees, late fees, and registration fees, if applicable. Breakage and/or other mandatory application deposits are required of the participating family member to register for classes.

*Employee Eligibility:* The staff fee privilege may be transferred to a qualified family member of an employee appointed at half-time (.5 FTE) or more, not including temporary classified employees, graduate assistants or other student employees. Employee eligibility is verified through Human Resource Information System records. The transfer of staff fee benefits is not available for retired employees. Eligibility of employees on furlough or lay-off status is subject to applicable collective bargaining agreements.

*Family Member Eligibility:* Qualified family members include the eligible employee's spouse, domestic partner, dependent children and dependent children of domestic partners in accordance with IRS Code 152 and Section One of the Public Employees Benefit Board.

*Second Family Member Eligibility:* Unclassified employees who meet the eligibility criteria and who are using the staff fee for the undergraduate education of a dependent child are entitled to a second,

concurrent staff fee privilege for another dependent child to attend undergraduate programs only at the University of Oregon. The terms and conditions (i.e., rates, fees, eligibility requirements, credit limits, and excluded programs) are the same as under the Tuition Benefit for Employees and for Family Members.

*Institutional Eligibility:* The benefit may be used at any Oregon four-year public institution. Family members who use the staff fee for courses away from the employee's home institution are subject to staff fee policies and procedures of the instructing institution.

*Excluded UO Programs:* See "Reduced Tuition Benefit for Employees" above.

*12-Credit Limit and Tuition Plateaus:* The maximum number of credits to which the staff fee may be applied is 12 credits per quarter or per semester. The family member enrolled for more than 12 credits in one term will pay for each additional credit at the campus published "each additional credit" tuition rate applicable to resident undergraduate or graduate students, depending upon the family member's student classification. There is no tuition plateau for a family member using the staff fee for graduate courses.

*Auditing:* No tuition shall be assessed to courses enrolled in by the Family Member with a grading option of 'audit'. Attendance under such condition must be with the instructor's consent and on a space-available basis. Institutions are required to maintain a record of the courses audited. Courses approved for audit by the instructor confer no credit to the student, are not charged staff fee rates or regular tuition, and may be used in addition to staff fee privileges during a term. Any applicable course, lab or material fees associated with auditing for-credit classes will be assessed by the institution and is the responsibility of the family member. This provision cannot be subdivided in conjunction with the Reduced Tuition Benefit for Employees.

## **Graduate Assistants**

Graduate students appointed by the University of Oregon as Graduate Teaching Fellows (GTFs), including as graduate teaching assistants and graduate research assistants, are paid at established institutional salary rates and are exempt from the payment of tuition at the University of Oregon up to the first 16 credits per term subject to institutional policy. Appointment as a GTF may not be for less than .20 FTE for the term of appointment.

The tuition will be assessed to the employing account or department within the University, not to exceed the graduate resident, full-time student tuition per term. When a GTF is authorized to exceed 16 credits per term, the University shall charge the GTF the resident overload tuition for the excess credits that correspond to their major's tuition schedule. GTFs are exempt from payment of tuition and of fees for self-support courses that are required for the completion of the degree for up to 16 credit hours taken in any quarter to which the appointment applies.

GTFs are assessed mandatory enrollment fees, a portion of which is subsidized by the institution during fall, winter, and spring.

Students with academic-year GTF appointments may be eligible for a summer tuition waiver if they meet the criteria outlined on the Graduate School website.

## **Resident Oregon Senior Citizen Program**

The Senior Citizen Program is designed for Oregon resident senior citizens, age 65 or older. Seniors may register to attend class as an auditor at no charge on a space-available basis, and with the permission of the offering department. Classes taken under this program do not offer credit and cannot be counted toward a degree. If credit is sought, tuition and fees, as well as charges for special materials or fees, if any, will be assessed according to applicable tuition schedules and records will be maintained. Self-support classes are excluded from this benefit and Incidental Fee services are not available.

## **Auditors**

A student enrolled in a combination of for-credit and audit courses will be assessed for the total hours under the tuition and fee schedule, inclusive of for-credit and audited courses, appropriate to that individual's course or student level. If enrolled for audit courses only, the student will pay the same required fees as assessed for similar hours of for-credit classes.

## **University/School Partnership Co-Pay Program**

School districts having contracts with the University to supervise educator professionals preparing for Oregon licensure may exercise these provisions.

### *Earning the Co-Pay*

For each permissible activity provided under contract with a cooperating district, a district earns a co-pay privilege to register any licensed educational professional employed by the district at the University co-pay fee rate. The rate should be one-third of the tuition charged for the course. Institutions with current contractual obligations may elect to defer compliance of the rate until expiration of the existing contract.

A "co-pay privilege" allows one individual to register for up to 8 quarter credit hours in the term it is used. The total reduced fee credits awarded for practica and student teaching may not exceed 11 in a year, per each university student provided services by the district.

Supervised full-time student teaching: Co-pay privileges of 5 credit hours may be awarded for supervision of the final full-time student teaching per quarter. Student teaching is the culminating, full-time supervised teaching experience provided for students completing a program approved by the

Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

Experiential preparatory practica or part-time student teaching: Co-pay privileges of 3 credit hours may be awarded for supervision of students in experiential preparatory practica or part-time student teaching per academic quarter. These are practica assigned to or required of the student prior to or concurrent with student teaching and block practica and/or other miscellaneous practica offered by colleges and divisions of education for students completing a program approved by the Teacher Standards and Practices Commission, leading to Initial Licensure in one or more of four authorizations: Early Childhood, Elementary, Middle, and High School; and specialty endorsements.

#### *Redeeming Reduced Fee Credits*

Earned co-pay privileges must be used by a licensed educator professional employed by the school district within five successive academic quarters (including summer session) following the quarter in which the supervision is provided, after which time the co-pay privilege is void.

The co-pay fee is applicable only up to 8 credit hours in any academic quarter for any one licensed educator professional, including summer session, even though the district may have earned two or more enrollment privileges, or if the licensed educator professional using the privilege enrolls for fewer than 8 credits.

Unused portions of an enrollment privilege may not be carried to another term or used by another teacher.

A co-pay privilege may be used during any academic term (including summer session) at the University to the extent that it has a teacher preparation program. The University may enter into “partnerships of trade” with any sister institution if they are willing to accept vouchers from other institutions.

The University may set limits on courses available for those redeeming vouchers/co-pays (for example, courses in summer session, distance education, continuing licensure, continuing/extended education). Each institution will indicate on the voucher the existence of restrictions.

The co-pay privilege may also be redeemed by an administrator, counselor, or other licensed educator professional in a cooperating district.

#### *Other Provisions*

If a licensed educator professional using a co-pay privilege registers for 8 hours or fewer and desires the in-residence services provided by the Health Service and Incidental Fee, the licensed educator professional may elect those services by paying the appropriate fee for the number of hours enrolled. If the licensed educator professional using the co-pay privilege registers for more than 8 credit hours, the first 8 hours may be taken at the institution’s co-pay rate. Hours in excess of 8 shall be at the appropriate credit hour rate (graduate or undergraduate, resident or nonresident) and the institution shall charge all enrollment fees applicable to the total number of hours for which the licensed educator professional is registering.

Each institution may, at its discretion, extend to the eligible district licensed educator professional other privileges such as use of the institution library, access to campus parking, and admission to campus events at faculty and staff rates, provided that such extended privileges do not exceed the benefits made available to the faculty and staff of the institution.

### **Other Remission Programs**

The University may create individual fee remission programs to address enrollment management and financial aid program needs.

- *Awards:* Awards may vary in amount but cannot exceed the total cost of education.

## **FEE POLICIES SPECIFIC TO SUMMER SESSION**

Tuition rates may be assessed based on undergraduate and graduate course designation or student classification.

Course level designations are generally defined as follows:

- Course numbers assigned 499 and below are assigned undergraduate tuition rates.
- Course numbers assigned 500 and higher are assigned graduate tuition rates.

Semester rates for students attending the University of Oregon Law programs are modified for the Summer Session program.

Tuition may be assessed on a per-credit hour basis or aligned to the preceding academic year structure. Mandatory enrollment fees are assessed in the summer. The tuition reduction program for employees and - qualifying family/dependents, and the graduate assistant fee privileges may be authorized during the Summer Session at the option of the University. When authorized, these benefits shall conform to policies set forth in this Fee Book. Employees or qualifying family/dependents who seek to use the staff fee privilege for courses away from their home institution are subject to corresponding fee policies of the instructing institution.

The summer refund policy for course load reduction or withdrawal differs from the academic year policy; the policy can be found at

<http://brp.uoregon.edu/sites/brp/files/brp/fees/Fee%20Refund%20Schedule.pdf>.

## **REFUNDS, WAIVERS, AND ACCOUNTS RECEIVABLE POLICIES**

## Refund Policies

Refund policies for course load reduction or withdrawal are subject to University policy and procedure. Refunds may be granted to students in accordance with the refund schedule at <http://brp.uoregon.edu/sites/brp/files/brp/fees/Fee%20Refund%20Schedule.pdf>.

## Military Duty Refund Policy

Any student service member or National Guard member with orders to report for active military duty may withdraw at any time during the term and receive a full refund. If sufficient course work has been accomplished and the instructor feels justified, the instructor may either grant credit for the course work completed and assign a grade or arrange for the student to take an incomplete. In either of these cases, no refund will be given. The student may use a combination of these options.

## Waiver of Certain Student Fees

Certain student fee charges may be waived when regulations of federal agencies or contract agreements preclude the assessment of those fees. Please contact the University of Oregon's Office of Business Affairs to determine which fee charges are eligible, if any, for this waiver.

## Institution Authority to Adjust Charges

The President or designee may make tuition refunds and waive fines or charges that result from circumstances beyond the student's control or are for the best interest of the institution.

## Revolving Charge Agreement

The University of Oregon has adopted a policy establishing a Revolving Charge Agreement. Transactions covered by the Plan may include (by way of description and not limitation) tuition, fees, housing charges and other obligations primarily involving students, including and fines and penalties, incurred by anyone.

The policy shall:

- Describe the interest to be charged, as well as service charges, collection and other fees and costs, if any, and penalties that would apply should an account become delinquent;
- Provide for an agreement to be signed by the obligor

## Interest on Overdue Accounts



The University of Oregon charges simple interest on the total due amount not paid within the grace period. The annual rate is 9 percent. Periodic rate of interest is .75 percent per month, or fraction thereof, of the unpaid total due balance remaining on the account as of the tenth of the month.