Employee Fee Waiver/Fee Reduction Program Overview

FALL 2023
Chico State’s Fee Waiver Partners

Human Resources Service Center
  ◦ Fee Waiver website
  ◦ feewaivers@csuchico.edu
  ◦ (530) 898-6433
  ◦ Jessica Plascencia

Financial Aid
  ◦ Casey Dinsmore, Advisor
  ◦ (530) 898-6451

Undergraduate Admissions
  ◦ Melanie Manes & Maggie Souza, Admissions Office
  ◦ (530) 898-6322

Graduate Admissions
  ◦ Micah Lehner, Carrie Adsit & Michael Pratt- Graduate Studies
  ◦ (530) 898-6880

Student Financial Services
  ◦ Gina O'Neal & Som Khang
  ◦ (530) 898-5936

It takes a village!
And a little time...
1. Eligibility Requirements
- Employee Eligibility
- Dependent Eligibility
- Employee Responsibilities

It is important for you to determine if you will be eligible during the semester you wish to take classes. If not, you will be responsible for covering the full cost.

2. Fee Waiver Options & Instructions
- Career Development (DEV) Option
- Work-Related (.J09) Option
- Dependent: Transfer of Fee Waiver Benefit Option

3. Understand the Finances
- Pay Chico Fees prior to Fee Deadlines
- Only State-Funded Classes are Eligible
- How to check if CSU Program is Eligible for Fee Waiver
- Ask if Fee Waiver will Impact Financial Aid
- Tax Implications
- Doctoral Programs

4. Apply, Pay Fees, and Register for Classes
- Cal State Apply
- One-Time Cal State Apply Fee Refund Process
- Fee Waiver Application Deadline and Requirements
- Chico Registration Steps
- How to use the Student Center (registration dates, holds, add courses, pay fees, buy books)
- Search CSU Degrees

Fee Waiver Forms (PDFs on Box)
- Employee Fee Waiver Application - with instructions to Adobe Sign form (PDF)
- Admission Application for Work-Related (.J09) Fee Waiver Option - with instructions to Adobe Sign form (PDF)
- Dependent Fee Waiver Application - with instructions to Adobe Sign form (PDF)

Fee Waiver Deadlines

Important: Please pay fees before the fee payment deadline.

Fee Waiver Application Deadlines are the first Friday as noted below:
- Winter* = Sept 1 - Nov 3
- Spring = Sept 1 - Nov 3
- Summer* = Mar 1 - May 6
- Fall = Mar 1 - May 6

*Most or all courses during this term at Chico State or other CSU campuses may not be state-funded and therefore not covered by the fee waiver program.
What’s the purpose?

1. Provide **CSU employees** with professional development opportunities
2. Extend education to eligible family
Earnings and unemployment rates by educational attainment, 2022

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>Median usual weekly earnings ($)</th>
<th>Unemployment rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctoral degree</td>
<td>2,083</td>
<td>1.0</td>
</tr>
<tr>
<td>Professional degree</td>
<td>2,080</td>
<td>1.4</td>
</tr>
<tr>
<td>Master's degree</td>
<td>1,661</td>
<td>1.9</td>
</tr>
<tr>
<td>Bachelor's degree</td>
<td>1,432</td>
<td>2.2</td>
</tr>
<tr>
<td>Associate's degree</td>
<td>1,005</td>
<td>2.7</td>
</tr>
<tr>
<td>Some college, no degree</td>
<td>935</td>
<td>3.5</td>
</tr>
<tr>
<td>High school diploma</td>
<td>853</td>
<td>4.0</td>
</tr>
<tr>
<td>Less than a high school diploma</td>
<td>682</td>
<td>5.5</td>
</tr>
</tbody>
</table>

All workers: $1,123
Total: 3.0%


Last updated 9/06/2023
CSU, Chico Fee Waiver Investment

Waiver Value
Campus Investment in Employee Fee Waiver Program (Value of Fee Waivers Awarded)
Thinking about education?  
Tips for getting started

**Reflect and Plan**

Plan Your Career using tools at [https://www.csuchico.edu/staff-development/career/index.shtml](https://www.csuchico.edu/staff-development/career/index.shtml)

Go to the Career Center: take an online career assessment

Sit with a Career Center advisor, explore the assessment outcomes

Work with a general academic advisor to pick a program, examine courses you may already have on your transcript

Meet with the program’s academic advisor, develop a course list

**Establish a Work/Life Balance**

Talk to someone who’s worked while going to school

Discuss with your family/friends the time commitment of school

Develop a plan to balance work, school and your personal life
Where is the Fee Waiver Information Online?
What do you need to do?

1. **Cal State Apply**: only for new students (dependents and employees using the career development option)

2. **FW Forms**: Complete fee waiver forms, each term

3. **Pay** fees before the deadline

4. **Enroll** online in state-funded courses

5. **Check Portal** online to review courses and student financial record & pay any remaining fees
What do you need to know?

We’ll cover answers to questions we receive, but ultimately, you can submit a fee waiver application and begin the process.
Who’s eligible?

1. Which employees are eligible for the fee waiver?
   - Most Full-time permanent employees
   - Tenured and probationary faculty, faculty with 3-year appointments, coaches with 6 years consecutive years of service

2. Which dependents are eligible?
   - Admitted, matriculated student
   - Spouse
   - Domestic partner
   - Dependent child

<table>
<thead>
<tr>
<th>Employee Category</th>
<th>Dependent Child Age* Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit 1 (Physicians)</td>
<td>• A child or stepchild under age 23 who has never been married;</td>
</tr>
<tr>
<td>Unit 10 (IUOE)</td>
<td>• A child living with the employee in a parent-child relationship who is economically</td>
</tr>
<tr>
<td></td>
<td>dependent upon the employee, underage 23 and has never been married; or</td>
</tr>
<tr>
<td>Units 2, 5, 7, 9 (CSUEU)</td>
<td>• A child or stepchild age 23 or above who is incapable of self-support due to a disability</td>
</tr>
<tr>
<td>Unit 3 (Faculty)</td>
<td>which existed prior to age 23.</td>
</tr>
<tr>
<td>Unit 4 (Academic Professionals)</td>
<td></td>
</tr>
<tr>
<td>Unit 6 (Skilled Trades)</td>
<td>• A child or stepchild under age 25 who has never been married;</td>
</tr>
<tr>
<td>Unit 8 (Public Safety)</td>
<td>• A child living with the employee in a parent-child relationship who is economically</td>
</tr>
<tr>
<td>C99 (Confidential)</td>
<td>dependent upon the employee, underage 25 and has never been married; or</td>
</tr>
<tr>
<td>M98 (Executive)</td>
<td>• A child or stepchild age 25 or above who is incapable of self-support due to a disability</td>
</tr>
<tr>
<td>M80 (MPP)</td>
<td>which existed prior to age 25.</td>
</tr>
</tbody>
</table>
Where can you take classes?

Any CSU

Any state-funded course

- Which may include:
  - Limited state-support summer courses
  - Cal Arts summer program
  - Some Study Abroad courses
  - Winter sessions may be attended at quarter campus only (e.g., Cal Poly SLO)
More Class Delivery Choices than Before

- In-Person
- On-line - synchronous
- On-line - asynchronous
- Hi-flex = a combo of all three
Search CSU Degrees

http://degrees.calstate.edu/

“Source” displays if it is Extension or **Campus (State Funded)**

<table>
<thead>
<tr>
<th>CAMPUS</th>
<th>DEGREE</th>
<th>UNITS REQUIRED</th>
<th>MAJOR (CONCENTRATION)</th>
<th>VIDEO</th>
<th>FORMAT</th>
<th>PROGRAM CODE</th>
<th>SOURCE</th>
<th>APPLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominguez Hills</td>
<td>MPA</td>
<td>38</td>
<td>Public Administration (Criminal Justice Policy and Administration)</td>
<td>Face-to-Face</td>
<td></td>
<td>21081</td>
<td>Extending</td>
<td>Get Started</td>
</tr>
<tr>
<td>Dominguez Hills</td>
<td>MPA</td>
<td>38</td>
<td>Public Administration (Public Management)</td>
<td>Face-to-Face</td>
<td></td>
<td>21021</td>
<td>Campus</td>
<td>Get Started</td>
</tr>
<tr>
<td>Dominguez Hills</td>
<td>MPA</td>
<td>38</td>
<td>Public Administration (Non-Profit Administration)</td>
<td>Online</td>
<td></td>
<td>21066</td>
<td>Extending</td>
<td>Get Started</td>
</tr>
<tr>
<td>Dominguez Hills</td>
<td>MPA</td>
<td>38</td>
<td>Public Administration (Public Administration General)</td>
<td>Online</td>
<td></td>
<td>21021</td>
<td>Extending</td>
<td>Get Started</td>
</tr>
</tbody>
</table>
Choose a Fee Waiver Option

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Student Is</th>
<th>Admissions Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dependent (or Transfer of Fee Waiver Benefit) Option</strong></td>
<td>Admitted for identified academic goal</td>
<td>Dependent</td>
<td>Admitted = Matriculated student</td>
</tr>
<tr>
<td><strong>Career Development (DEV) Option</strong></td>
<td>Identified academic goal</td>
<td>Employee</td>
<td>Admitted = Matriculated student</td>
</tr>
<tr>
<td><strong>Work-Related (JOB) Option (for CSU job or career)</strong></td>
<td>Improve skill levels to perform existing job / enhance skills for CSU career</td>
<td>Employee</td>
<td>Intermittent = Transitory: must re-apply each term</td>
</tr>
</tbody>
</table>
Do I apply via CSU Admissions?

The unified California State University admissions: Cal State Apply

Employees wishing to begin using the Career Development fee waiver program must apply to the campus.

Please contact Admissions for details and instructions

Undergraduate Admissions
- Melanie Manes, Admissions Office (530) 898-6322

Graduate Admissions
- Micah Lehner, Graduate Studies (530) 898-6880
- Graduate admissions may have a different application schedule and deadlines.

You may be eligible for a One-Time CSU, Application Fee Refund (applies to employees and dependents)

<table>
<thead>
<tr>
<th>Term</th>
<th>Priority Application Filing Period*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2023</td>
<td>October 1, 2022 - November 30, 2022</td>
</tr>
<tr>
<td>Spring 2024</td>
<td>August 1, 2023 - August 31, 2023</td>
</tr>
<tr>
<td>Winter 2024</td>
<td>June 1, 2023 - June 30, 2023 +</td>
</tr>
<tr>
<td>Summer 2024</td>
<td>February 1, 2024 - February 28, 2024</td>
</tr>
<tr>
<td>Fall 2024</td>
<td>October 1, 2023 - November 30, 2023</td>
</tr>
</tbody>
</table>
Submitting a Fee Waiver Application

We will only accept Fee Waiver applications routed through our Adobe Sign workflow process.

The Career Development Plan is now incorporated into the employee form.

Work-Related Admissions Application
- Undergraduate and Graduate admissions application combined into one form
- Submitted and processed through Adobe Sign

If you are submitting an Employee Fee Waiver application, make sure your supervisors email address is typed in correctly.

One (1) application required each term

<table>
<thead>
<tr>
<th>Term</th>
<th>Fee Waiver Application Submission Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>First Monday in April through the first Friday in May</td>
</tr>
<tr>
<td>Fall</td>
<td>First Monday in April through the first Friday in May</td>
</tr>
<tr>
<td>Winter</td>
<td>First Monday in October through the first Friday in November</td>
</tr>
<tr>
<td>Spring</td>
<td>First Monday in October through the first Friday in November</td>
</tr>
</tbody>
</table>

*Most or all courses during this term at CSU, Chico or other CSU campuses may not be state-funded and therefore not covered by the fee waiver program.
### Employee Information

**Select**

- Campus of enrollment
- Term
- Year
- Enrollment Status
- Class standing

**Last Name**: Chico State ID: Email Address:

**Job Title**: Bargaining Unit: Report to Name (MPP or Supervisor): Employment Status

**Normal Work Schedule**: Monday - Friday 8am - 5pm: Other

**FERPA**: Yes: No: On approved leave of absence? Yes: No: If yes, indicate time base:

**Degree Objective**: Declared Major

### Course Information and Release Time

- This is a request to revise a previously submitted fee waiver.
- The employee may request fee waivers for a maximum of two (2) courses or six (6) units, whichever is greater per term.

<table>
<thead>
<tr>
<th>Sub/Dept</th>
<th>Course # (3-digit)</th>
<th>Course Title</th>
<th>Units</th>
<th>Days/Times</th>
<th>Hours/Week (1 class hr)</th>
<th>Requesting release time for one class?</th>
<th>Check if during work hours (1 class hr)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes: No: Note: The option is uncheckable</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes: No: Will the course require a change in work schedule?</td>
<td>Yes: No:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes: No: Fyss, list work schedule:</td>
<td></td>
</tr>
</tbody>
</table>

If course has a lab, list days and times on a separate row and specify "Lab" in course title.

### Employee Development Plan

- Highest level of education completed:

- Fee Waiver Options: Please select one option (Do Not Fill out both options): I understand with either option I will need to complete and submit a Fee Waiver (Tuition Reduction) application each term.

- Career Development (DEV) Option:
  - I would like to use the fee waiver (dev) on an academic goal (e.g., degree, credential, certificate) as stated below. I will apply to be admitted to a CSU so that I can take advantage of earlier career registration periods.

  - Do you need to apply for admittance to the university this semester? Yes: No: Will contact admissions: Yes: No: I am continuing: Yes: No:

  - How do you plan to utilize the Fee Waiver (Tuition Reductions) benefit to meet your career goals and objectives?

- Work-related (JOB) Option:
  - I would like to use the fee waiver (Tuition Reduction) benefit intermittently to complete courses that are CSU job or career related. I understand I will need to complete transfer admission paperwork for each term. I understand I cannot register until the add/drop period and will be classified as a transfer student at the university.

  - Briefly describe your current job responsibilities (3 sentences):

  - 

  - Employee Signature: Date: Oct 25, 2022

- Employee Name:

- Supervisor Name:

- Email:

- Employee Signature:

- Email:

- Supervisor Signature:

- Email:
The employee may request fees be waived for a maximum of two (2) courses or six (6) units, whichever is greater, per term.

Classes must be at one CSU campus per term.

Two employees can submit fee waivers for the same dependent requesting fees waived for 4 courses.

Please help us identify when one dependent is benefiting from two employee fee waivers as it can impact taxation for the employees.
Yes, for up to 1 class

Depending on details within each CBA, the appropriate administrator shall grant the employee reasonable release time for 1 course per term if:

1) The course is job-related or part of an approved Career Development Plan
2) The operational needs of the department are met.

Participants in Unit 8 (SUPA) may not take classes on State time.

Want details?
- Employee Eligibility
- Release Time
  https://www.csuchico.edu/hr/pdev/feewaiver/eligibility/employee.shtml#release
How much do I pay?

Student Financial Services provides an estimate of fees TO PAY.

There may be additional Professional Program Fees or Online Program Fees.

Essentially, fees for part-time enrollment are mostly paid.

Fee Waivers

Employee Fee Waivers - Spring 2024

- The following employee groups are eligible to have all Category I fees waived, including the Graduate Professional fee: Academic Professionals (Unit 4), and CSUEU (Units 2, 3, 5, 7, 9).
- All other employee groups not listed above, along with all eligible dependents, are subject to Professional Program fees.
Who do I pay?

Pay fees to the **CSU the student will be attending**

If attending/paying “California State University, Chico”...

- Go into the Portal > Student Center > and pay fees through there, or
- Contact Cashiering, in **SSC 230**, for payment methods
Could the fee waiver impact financial aid?

Yes

- It may be beneficial NOT to use the fee waiver
- Please contact Financial Aid to discuss

Financial Aid

- **Casey Dinsmore**  
  Advisor  
  (530) 898-6451
### Taxation: When Student = Dependent

**It Depends...**

<table>
<thead>
<tr>
<th>Eligible Student is...</th>
<th>Undergrad and Post-Baccalaureate Courses</th>
<th>Graduate Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee’s Spouse or Dependent</strong></td>
<td>Nontaxable</td>
<td>Taxable</td>
</tr>
<tr>
<td><strong>Employee’s Domestic Partner</strong></td>
<td>Taxable</td>
<td>Taxable</td>
</tr>
</tbody>
</table>

- The Fee Waiver Program is a **taxable** fringe benefit... to the **EMPLOYEE**
Taxation: When Student = **Dependent**

Estimated Flat Tax Rate for 2021: 36.25%

**Example 1: Dependent Fees Waived: Dependent in Master's Program; Employee is in Units 2, 4, 5, 7, or 9**

<table>
<thead>
<tr>
<th>Est. Fees Waived</th>
<th>Per Term</th>
<th>Times</th>
<th>Estimated Flat Tax</th>
<th>Equals</th>
<th>Estimated Imputed Tax</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,084</td>
<td>Spring</td>
<td>X</td>
<td>36.25%</td>
<td>$755.45</td>
<td>To be deducted from a Spring paycheck for employee</td>
<td></td>
</tr>
<tr>
<td>$2,084</td>
<td>Fall</td>
<td>X</td>
<td>36.25%</td>
<td>$755.45</td>
<td>To be deducted from a Fall paycheck for employee</td>
<td></td>
</tr>
</tbody>
</table>

**When?**

If the fee waiver is taxable, the flat tax will be subtracted from the employee's paycheck towards the end of the term. Estimated dates are:

- *Spring* = Paycheck dated May 1st
- *Summer* = Paycheck dated Sept 1st
- *Fall* = Paycheck dated Nov 1st
### Taxation: When Student = Employee

**It Depends...**

<table>
<thead>
<tr>
<th>Eligible Student is...</th>
<th>Undergrad and Post-Baccalaureate Courses</th>
<th>Graduate Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSU Employee</td>
<td>Nontaxable</td>
<td>Nontaxable up to $5,250 (per tax year)</td>
</tr>
</tbody>
</table>

- The Fee Waiver Program is a **taxable** fringe benefit... *to the EMPLOYEE*
Taxation: When Student = Employee

Employee Fees Waived & Taxable Income Reported for Employee

Note: Amounts listed below are for examples only and are not actual amounts.

Estimated Flat Tax Rate for 2021: 36.25%

Example 1: Employee is in Units 2, 3, 4, 5, 7, or 9, and is in a Master's Program with Professional Fees

- $3,140.00  Spring grad fees waived
- $1,620.00  Spring professional fees waived ($270 professional fee/unit X 6 units); Subtotal: $4,617.00
- $3,140.00  Fall grad fees waived
- $1,620.00  Fall professional fees waived ($270 professional fee/unit X 6 units)
- $9,520.00  Subtotal
- $(6,250.00)  Minus the tax threshold
- $4,270.00  Total value of fees to be taxed
- $1,547.88  Estimated Imputed Tax to be deducted from a Fall paycheck

When?
- Spring = Paycheck dated May 1st
- Summer = Paycheck dated Sept 1st
- Fall = Paycheck dated Nov 1st
Taxation: When Student = **Employee**

**Example 2: Employee is in Units 1, 6, or 8, and is in a Master's Program**

In this example, the program does not have professional fees, or the program requires professional fees and the CBA does not waive them for the employee and they are paid by the student.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$ 3,037.00</strong></td>
<td>Spring grad fees waived</td>
</tr>
<tr>
<td><strong>$ 3,037.00</strong></td>
<td>Fall grad fees waived</td>
</tr>
<tr>
<td><strong>$ 6,074.00</strong></td>
<td><strong>Subtotal</strong></td>
</tr>
<tr>
<td><strong>($5,250.00)</strong></td>
<td>Minus the tax threshold</td>
</tr>
<tr>
<td><strong>$ 824.00</strong></td>
<td><strong>Total value of fees to be taxed</strong></td>
</tr>
<tr>
<td><strong>x 36.25%</strong></td>
<td>Estimated Flat Tax Rate</td>
</tr>
<tr>
<td><strong>$ 298.70</strong></td>
<td>Estimated Imputed Tax to be deducted from a Fall paycheck</td>
</tr>
</tbody>
</table>

**When?**
- Spring = Paycheck dated May 1st
- Summer = Paycheck dated Sept 1st
- Fall = Paycheck dated Nov 1st
When and How do I sign up for classes?

**Chico Registration Steps**

You will receive a letter or email from Undergraduate Admissions or Graduate Studies. It will explain when to enroll.

How do I register for classes? Through the Student Center.

What if my class is closed or full? Submit a revised Fee Waiver application listing your revised course schedule.

How do I figure out which books to buy?

- Start with the Chico State Wildcat Store, then ask a student. They've discovered more resources than you can imagine!
New to being a student? It includes Student Center

The Student Center is where you search for available classes, enroll in courses, pay fees, discover holds, and more.
New to being a student? It includes Required Trainings

You will be assigned required student trainings, in addition to employee compliance trainings.
# Don’t be Surprised...

<table>
<thead>
<tr>
<th>WHEN THE EMPLOYEE IS THE STUDENT</th>
<th>WHEN THE DEPENDENT IS THE STUDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release time doesn’t equal # of courses waived</td>
<td>Regular admissions process happens</td>
</tr>
<tr>
<td>You are the last to enroll unless you’re matriculated (Career Development)</td>
<td>Don’t be surprised by taxes when a dependent becomes a grad student</td>
</tr>
<tr>
<td>You will get student emails</td>
<td></td>
</tr>
<tr>
<td>You don’t have all the student services</td>
<td></td>
</tr>
<tr>
<td>Don’t be surprised by taxes when you become a grad student</td>
<td></td>
</tr>
</tbody>
</table>
Chico State’s Fee Waiver Partners

It takes a village!

And a little time...

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