Employee Fee Waiver/ Fee Reduction Program Overview

FALL 2023



Chico State's Fee Waiver Partners

It takes a village!

And a little time...

Human Resources Service Center

- Fee Waiver website
- <u>feewaivers@csuchico.edu</u>
- (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

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.

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
- <u>Doctoral Programs</u>

Fee Waiver Forms (PDFs on Box)

- <u>Employee Fee Waiver Application with instructions to</u>
 Adobe Sign form [□] (PDF)
- Admission Application for Work-Related (JOB) Fee Waiver
 Option with instructions to Adobe Sign form ^[2] (PDF)
- <u>Dependent Fee Waiver Application with instructions to</u>
 <u>Adobe Sign form</u> (PDF)

2. Fee Waiver Options & Instructions

- · Career Development (DEV) Option
- · Work-Related (JOB) Option
- Dependent (Transfer of Fee Waiver Benefit) Option

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 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.

Today's Agenda

HTTPS://WWW.CSUCHICO.EDU/HR/
PDEV/FEEWAIVER/

What's the purpose?

- 1. Provide CSU employees with professional development opportunities
- 2. Extend education to eligible family

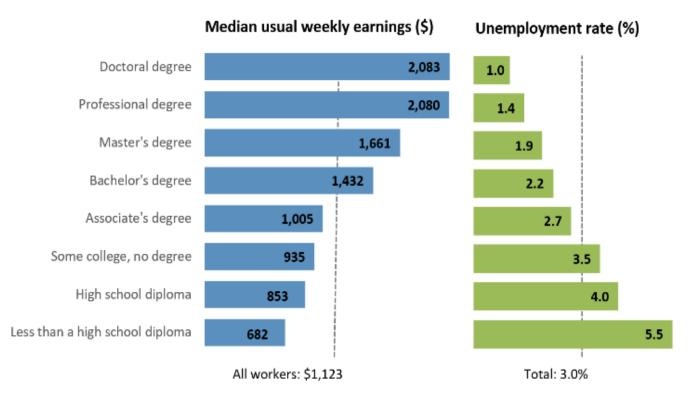




Education Pays

https://www.bls.gov/emp/chartunemployment-earningseducation.htm

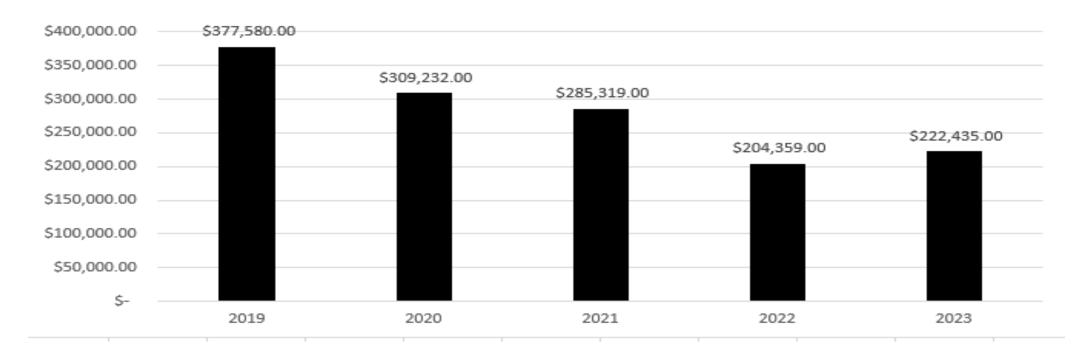
Earnings and unemployment rates by educational attainment, 2022



Note: Data are for persons age 25 and over. Earnings are for full-time wage and salary workers. Source: U.S. Bureau of Labor Statistics, Current Population Survey.

CSU, Chico Fee Waiver Investment

Waiver ValueCampus 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

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

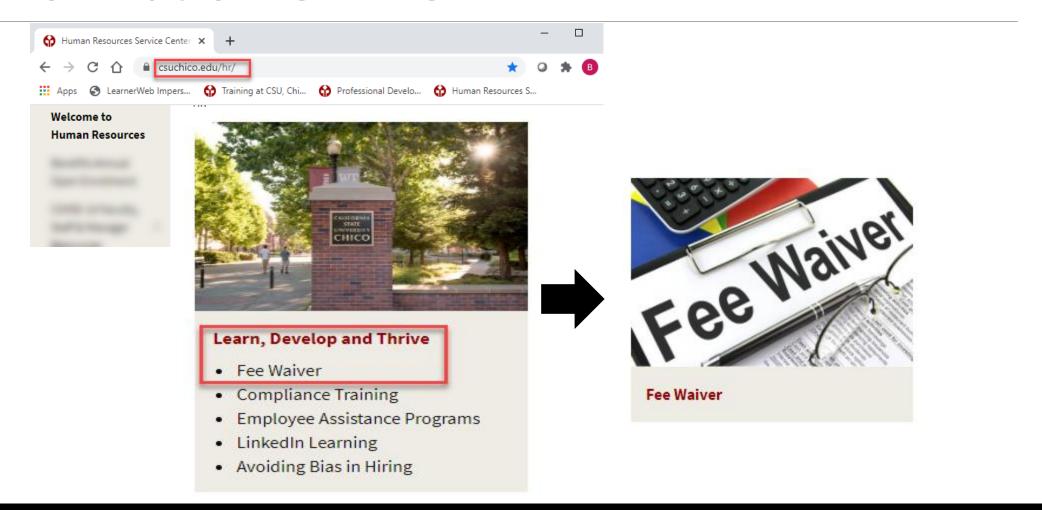
Talk to someone who's worked while going to school

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

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



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)





In-Person

On-line – synchronous

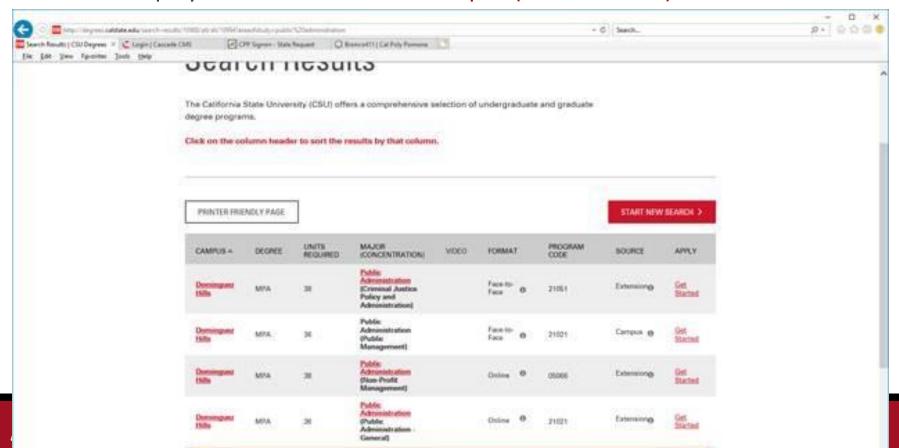
On-line - asychronous

Hi-flex = a combo of all three More Class
Delivery
Choices than
Before

Search CSU Degrees

http://degrees.calstate.edu/

"Source" displays if it is Extension or Campus (State Funded)



Choose a Fee Waiver Option

Option	Description	Student Is	Admissions Type
Dependent (or Transfer of Fee Waiver Benefit) Option	Admitted for identified academic goal	Dependent	Admitted = Matriculated student
Career Development (DEV) Option	Identified academic goal	Employee	Admitted = Matriculated student
Work-Related (JOB) Option (for CSU job or career)	Improve skill levels to perform existing job / enhance skills for CSU career	Employee	Intermittent = Transitory: must reapply each term



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)

Term	Priority Application Filing Period*
Fall 2024	October 1, 2023 - November 30, 2023
Spring 2024	August 1, 2023 – August 31, 2023
Winter 2024	June 1, 2023 – June 30, 2023 +
Summer 2024	February 1, 2024 - February 28, 2024
Fall 2023	October 1, 2022 - November 30, 2022



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 <u>supervisors email address is typed in correctly</u>.

One (1) application required each term

Term	Fee Waiver Application Submission Period
Summer*	First Monday in April through the first Friday in May
Fall	First Monday in April through the first Friday in May
Winter*	First Monday in October through the first Friday in November
Spring	First Monday in October through the first Friday in November

*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.



CALFORNIA STATE UNIVERSITY, CHICO

400 W. 1ST STREET KENDALL HALL ROOM 220 CHICO, CA 95929-0010 530-898-6771

Fee Waiver Application for Dependents

HUMAN RESOURCES SERVICE CENTER	FAX: 530-898-5120	
Instructions		
This form must be viewed in Adobe Acrobat or Reader. See instr	uctions on our Forms & Doo	ument page regarding pdf viewers.
Return completed form with required signatures to Human Resou any questions or need assistance, please email feewaivers@csus		
Employee Information		
Employee Name: *	Campus ext: (Chico State ID (EmpIID): *
Department: *	Job Title: *	
Campus Zip: Campus Email: *	Bargaining Unit: *Se	elect
Employment Status O Full Time O Part Time	e *Other	
Probationary Staff Permanent Staff	Temp Staff	MPP Taculty
I wish to transfer my fee waiver benefit to my:		
Spouse by marriage		
Dependent child (please specify by checking the most	applicable description be	elow):
my child or stepchild under age 25 (or under age 23 for	Units 1, 8 and 10 employees)	who has never been married;
a child (not my child or stepchild) living with me in a me, under age 25 (or under age 23 for Units 1, 8 and 10 er		
my child or stepchild age 25 or above (or age 23 or ab due to a disability that existed prior to age 25.	ove for Units 1, 8 and 10 emplo	yees) who is incapable of self-support
Domestic partner (Declaration of Domestic Partnership	is filed with California S	ecretary of State)
Dependent Information		
Eligible employees may transfer their fee waiver program benefits to an eli	gible dependent such as their s	pouse, dependent child, or domestic partner.
*	*	
Full Dependent Name	Campus ID	Date of birth, if dependent child
Phone Number: Total units this semester: 0.6	.0 6.1 or more Paid CSU, A	pplication Fee for the first time this semester? Yes No
CSU Campus of enrollment *Select	 Semester or Term: 	Select Academic Year: *Select *
Class standing: O Undergrad Graduate	Certificate or Creden	tial *O Doctorate
Status: Continuing Re	turning after break from e	nrollment
Enrolling in (check all that apply): * 100-400 level courses	500 level courses	O 600 level courses
(Undergraduate)	(Credential)	(Graduate)
Student must be matriculated toward a CSU degree or Teaching Credentia	l; Course fees, such as a gradu	ate business degree fees, may not be waived.
Employee Signature		
I understand my dependent (spouse, domestic partner or dependit teaching credential in the CSU, and the course(s) taken through to reaching credential. I understand that the employee fee waiver Continuing Education courses do not qualify. Unsatisfactory perficause for withholding further approval for participation in this prog Coordinator if my dependent withdraws from classes.	he fee waiver program need program only covers up to ormance in a course(s) or no	to be for credit toward completion of that degree two state-funded courses and Open University or at maintaining good academic standing may be
Employee Signature: Signature: Click here to sign	1	Date: Mar 29, 2022
Human Resourc Email: *Enter your email add	dress	





400 W. 1ST STREET KENDALL HALL ROOM 216 CHICO, CA 95929-0010 530-898-6433 FAX: 530-898-6095

Fee Waiver (Tuition Reduction) Application for Employees

Employee	Informat	ion]
*Select		▼ *Select	▼ *Sel	. ▼ *Select		-	*Select	. •	
Campus of e	nrollment	Term	Year	Enrollme	nt Status		Class sta	anding	-
Last Name		First N	Jame		.* Chico S	tate II I	*	Email Address	_
*	*Selec		*		Criico s	tate ID	*Select	Email Address	
Job Title	Bar	gaining Unit	Report	t to Name (MP	P or Supervisor)	Employ	ment Status	
Normal Work	c Schedule:	Monday - Friday 8a	am - 5pm 🏌	Other					
FERP Faculty	Yes O	No On and	roved leave	*	Yes No	If west indi	cate time	hase	
*Select	. 0 103 0	* *	noved leave	Or absence:	0 163 0 110	ii yes, iiidi	cate time	Dase	
Degree Obje	ctive	Declar	red Major						
		and Release Tin							٦
									J
	•	vise a previously sub							
		est fees be waived for	1						_
Subj/Dept	Course # (3-digit)	Course Title	Units	Days/Times	Check if during work hours (1	*Requesti	ng release	time for one class?	
1	(3-aigit)				class max)	Yes	No*No	ote:This option is not available for	
*	*	*	*	*				mployees	
			1			Will the cour	se require a	change in work schedule?	
						Yes (◯ No		
				-		If yes, list w	ork schodu	ıla.	
		Tatalillada	*			ii yes, iist w	ork scriedo	ile.	
<u> </u>		Total Units	"						
If course ha	s a lab, list da	ays and times on a se	parate row a	and specify "la	b" in course title	ē.			
F	DI								1
Employee	Develop	ment Plan							
Highest leve	l of educatio	n completed*							
Fee Waiver C	Options: Plea	se select one option	n (Do Not Fil	out both opt	ions)				
I understand v	with either op	tion I will need to comp	olete and sub	mit a Fee Waive	r (Tuition Reducti	ion) applicati	on each te	rm.	
_									
		nt (DEV) Option:	academic doa	l (e.a. dearee a	redential certific	ato) as stator	l below I w	ill apply to be admitted to	
a CSU so	that I can take	e advantage of earlier o	ourse registra	tion periods.	rederitial, certific	ate, as stated	Delow. I w	in apply to be duffitted to	
Do you need to apply for admission to the university this semester? Yes, I will contact admissions No, I am continuing									
How do you plan to utilize the Fee Waiver (Tuition Reduction) benefit to meet your career goals and objectives?									
	- p				g	,=====			
○ Work-re	lated (JOB)	Option:		· · · · · · · · · · · · · · · · · ·			cc		
		Fee Waiver (Tuition Red to complete transitory						r career related. I til the add/drop period and	
will be cla	assified as a tra	ansitory student at the	university.						
Briefly des	cribe your curre	ent job responsibilities (2-3	3 sentences):						
(mm.Bryvede) ·	umman, of the	course(s) description for a	asch class (1.3 s	oct 25, 2023	3	Sign	ature:	*Click here to sign	n
*						_		_	
					E	mployee Sig	Email:	*Enter your email ad	d
Employee Na	me						ature:		
						_	Email:		
Supervisor N	ame	4 desirabeta (2.000			Se	upervisor Sig			-
экір іт your su	pervisor is an	Administrator/MPP							
*						_	ature:		
A destruction	44004	Considered			-	dministrato	Email:	pature	_

Required

How many classes are covered?



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

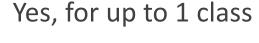
Classes must be at one CSU campus per term

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



Can I request release time from work?





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

- 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

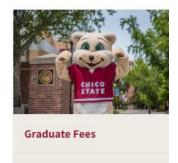
Essentially, fees for part-time enrollment are mostly paid

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), CSUEU (Units 2,5,7,9) and CFA (Unit 3).
- 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?

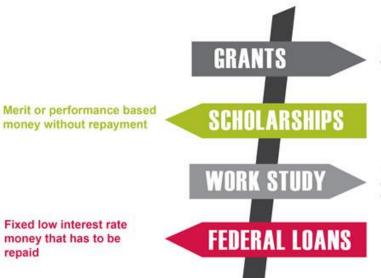


Yes

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

Financial Aid

Casey Dinsmore Advisor (530) 898-6451



Need based money without repayment

Need based campus job, earnings get paid directly to student as wages



Taxation: When Student = <u>Dependent</u>

It Depends...

Eligible Student is	Undergrad and Post- Baccalaureate Courses	<u>Graduate</u> Courses
Employee's Spouse or Dependent	Nontaxable	Taxable
Employee's Domestic Partner	Taxable	Taxable



The Fee Waiver Program is a taxable fringe benefit... to the EMPLOYEE



Taxation: When Student = <u>Dependent</u>

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

Est. Fees Waived	Per Term	Times	Estimated Flat Tax	Equals	Estimated Imputed Tax	Notes
\$2,084	Spring	Χ	36.25%	=	\$755.45	To be deducted from a Spring paycheck for employee
\$2,084	Fall	Χ	36.25%	=	\$755.45	To be deducted from a Fall paycheck for employee

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 = <u>Employee</u>

It Depends...

Eligible Student is	Undergrad and Post- Baccalaureate Courses	Graduate Courses
CSU Employee	Nontaxable	Nontaxable up to \$5,250 (per tax year)



■ The Fee Waiver Program is a taxable fringe benefit... to the EMPLOYEE



Taxation: When Student = <u>Employee</u>

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
\$(5,250.00)	Minus the tax threshold
\$ 4,270.00	Total value of fees to be taxed
x 36.25%	Estimated Flat Tax Rate
\$ 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 = <u>Employee</u>

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

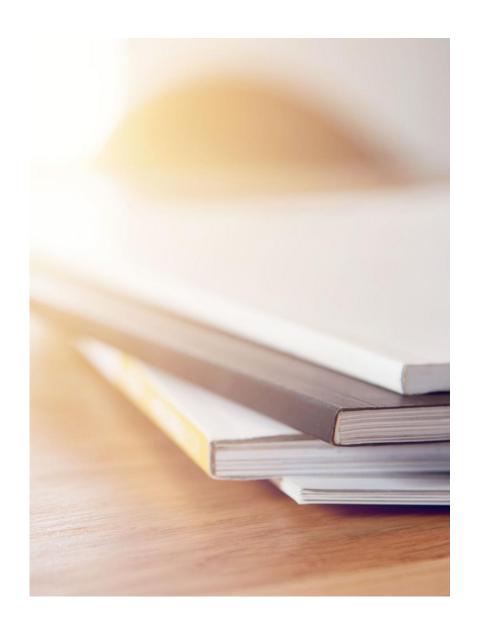
In this example, the program does not have professional fees, or the program requires professional fees and the CBA does not waive them for the employee and they are paid by the student.

\$ 3,037.00	Spring grad fees waived
<u>\$ 3,037.00</u>	Fall grad fees waived
\$ 6,074.00	Subtotal
\$(5,250.00)	Minus the tax threshold
\$ 824.00	Total value of fees to be taxed
x 36.25%	Estimated Flat Tax Rate
\$ 298.70	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





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.

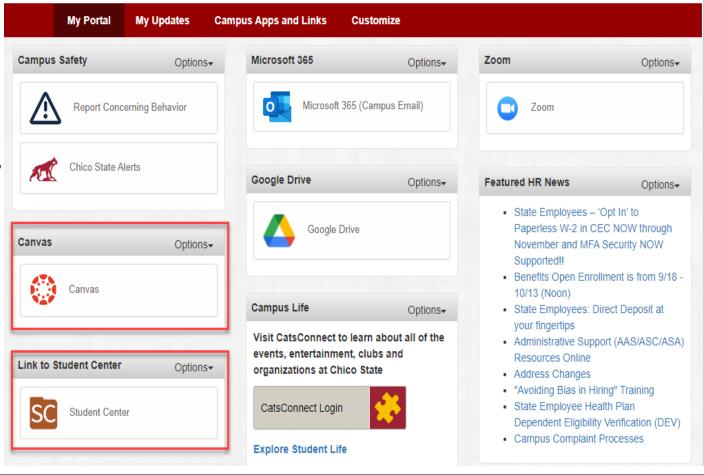
What if my class is closed or full? Submit a revised Fee Waiver application listing your revised course schedule.

How do I figure out which books to buy?

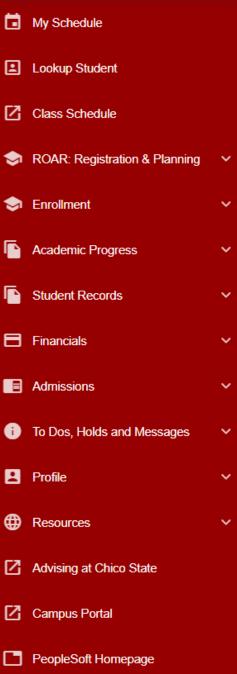
 Start with the Chico State Wildcat Store, then ask a student. They've discovered more resources than you can imagine!

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





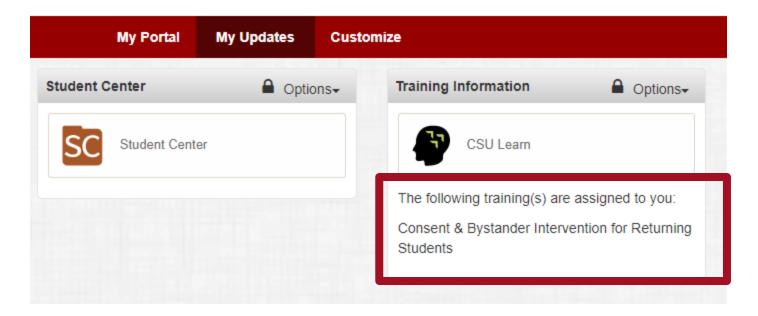


Dashboard

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...

WHEN THE **EMPLOYEE**

IS THE STUDENT

Release time doesn't equal # of courses waived

You are the last to enroll unless you're matriculated (Career Development)

You will get student emails

You don't have all the student services

Don't be surprised by taxes when you become a grad student

WHEN THE <u>DEPENDENT</u> IS THE STUDENT

Regular admissions process happens

Don't be surprised by taxes when a dependent becomes a grad student



Chico State's Fee Waiver Partners

It takes a village!

And a little time...

Human Resources Service Center

- Fee Waiver website
- <u>feewaivers@csuchico.edu</u>
- (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