Employee Fee Waiver/Fee Reduction Program Overview

FALL 2023

CALIFORNIA STATE UNIVERSITY, CHICO
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 (JOB) 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 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

<table>
<thead>
<tr>
<th>Year</th>
<th>Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>$377,580.00</td>
</tr>
<tr>
<td>2020</td>
<td>$309,232.00</td>
</tr>
<tr>
<td>2021</td>
<td>$285,319.00</td>
</tr>
<tr>
<td>2022</td>
<td>$204,359.00</td>
</tr>
<tr>
<td>2023</td>
<td>$222,435.00</td>
</tr>
</tbody>
</table>

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) Unit 10 (IUOE)</td>
<td>• 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.</td>
</tr>
<tr>
<td>Units 2, 5, 7, 9, (CSUEU) Unit 3 (Faculty) Unit 4 (Academic Professionals) Unit 6 (Skilled Trades) Unit 8 (Public Safety) C99 (Confidential) M98 (Executive) M80 (MPP)</td>
<td>• 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.</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)
## 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</strong> <em>(or Transfer of Fee Waiver Benefit)</em> Option</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 2024</td>
<td>October 1, 2023 - November 30, 2023</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 2023</td>
<td>October 1, 2022 - November 30, 2022</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

- **Employee Name**: [Redacted]
- **Campus**: Chico State (Empld)
- **Job Title**: [Redacted]
- **Campus Zip**: [Redacted]
- **Department**: [Redacted]
- **Bargaining Unit**: [Redacted]
- **Employment Status**: [Redacted]
- **Probationary Staff**: [Redacted]
- **Faculty**: [Redacted]
- **Probationary**: [Redacted]
- **Part Time**: [Redacted]
- **Full Time**: [Redacted]
- **Other**: [Redacted]
- **Campus ID**: [Redacted]
- **Email**: [Redacted]
- **Employee ID**: [Redacted]
- **Date of Birth**: [Redacted]
- **Social Security Number**: [Redacted]
- **Driver’s License**: [Redacted]
- **Hire Date**: [Redacted]
- **Campus Email**: [Redacted]
- **Hiring Date**: [Redacted]
- **Termination Date**: [Redacted]
- **Hiring Manager**: [Redacted]
- **Position Title**: [Redacted]
- **Email**: [Redacted]
- **Office Address**: [Redacted]
- **Salary**: [Redacted]
- **Effective Date**: [Redacted]
- **Special**: [Redacted]
- **Salary Grade**: [Redacted]
- **Campus Email**: [Redacted]
- **Term**: [Redacted]
- **Year**: [Redacted]
- **Enrollment Status**: [Redacted]
- **Class Standing**: [Redacted]
- **Campus ID**: [Redacted]
- **Email Address**: [Redacted]
- **Normal Work Schedule**: [Redacted]
- **Employment Status**: [Redacted]
- **FERP Faculty**: [Redacted]
- **On approved leave of absence**: [Redacted]
- **If yes, indicate time base**: [Redacted]
- **Degree Objective**: [Redacted]
- **Major**: [Redacted]

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.
- **Subject**: [Redacted]
- **Department**: [Redacted]
- **Course**: [Redacted]
- **Units**: [Redacted]
- **Days/Times**: [Redacted]
- **Requesting release time for one class?**: [Redacted]
- **Will the course require a change in work schedule?**: [Redacted]
- **If yes, list work schedule**: [Redacted]
- **Total Units**: [Redacted]

Employee Development Plan

- **Highest level of education completed**: [Redacted]
- Fee Waiver Options: Please select one option (Do Not Fill out both options)
- I understand that my option will need to be completed and submitted to the Fee Waiver (Tuition Reduction) application each term.
- **Career Development (DEV) Option**: [Redacted]
- **Work-related (JOB) Option**: [Redacted]

Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
Employee Signature: [Redacted]
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?

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), 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

**YES!**
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>Employee’s Spouse or Dependent</td>
<td>Nontaxable</td>
<td>Taxable</td>
</tr>
<tr>
<td>Employee’s Domestic Partner</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

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,140.00</td>
<td>Spring grad fees waived</td>
</tr>
<tr>
<td>$1,620.00</td>
<td>Spring professional fees waived ($270 professional fee/unit X 6 units); Subtotal: $4,617.00</td>
</tr>
<tr>
<td>$3,140.00</td>
<td>Fall grad fees waived</td>
</tr>
<tr>
<td>$1,620.00</td>
<td>Fall professional fees waived ($270 professional fee/unit X 6 units)</td>
</tr>
<tr>
<td>$9,520.00</td>
<td>Subtotal</td>
</tr>
<tr>
<td>$(6,250.00)</td>
<td>Minus the tax threshold</td>
</tr>
<tr>
<td>$4,270.00</td>
<td>Total value of fees to be taxed</td>
</tr>
<tr>
<td>x 36.25%</td>
<td>Estimated Flat Tax Rate</td>
</tr>
<tr>
<td>$1,547.88</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
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.

- $ 3,037.00  Spring grad fees waived
- $ 3,037.00  Fall grad fees waived
- $ 6,074.00  Subtotal
- $(5,250.00)  Minus the tax threshold
- $ 824.00  Total value of fees to be taxed
- $258.00  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.
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 DEPENDENT 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
  ◦ feewaivers@csuchico.edu
  ◦ (530) 898-6433
  ◦ Jessica Plascencia

Financial Aid
  ◦ Casey Dinsmore, Advisor
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