

Employee Tuition Fee Waiver Program Presentation

Presented by:
University Personnel &
Bursar's Office
Nov. 18, 2022



Zoom Etiquette

- All attendees are muted.
- If you have questions, type them into the chat box and we'll answer them during our Q & A session breaks.
- If your questions are specific & personal to your situation, please contact us directly for a consultation.
- A copy of the recording will be sent to all attendees of this presentation.



Objectives

- Overview of the Tuition Fee Waiver Program
- Benefits of the Tuition Fee Waiver Program
- Requirements of the Program



Types of Fee Waiver

- Job Related
- Career Development
- Dependent
- Teaching Associate - will not be discussed in our presentation because it's a separate process. Refer to [TA fee waiver process](#).
- **The fee waiver is not free. It's at a reduced rate. It will be taxed appropriately and by term.**

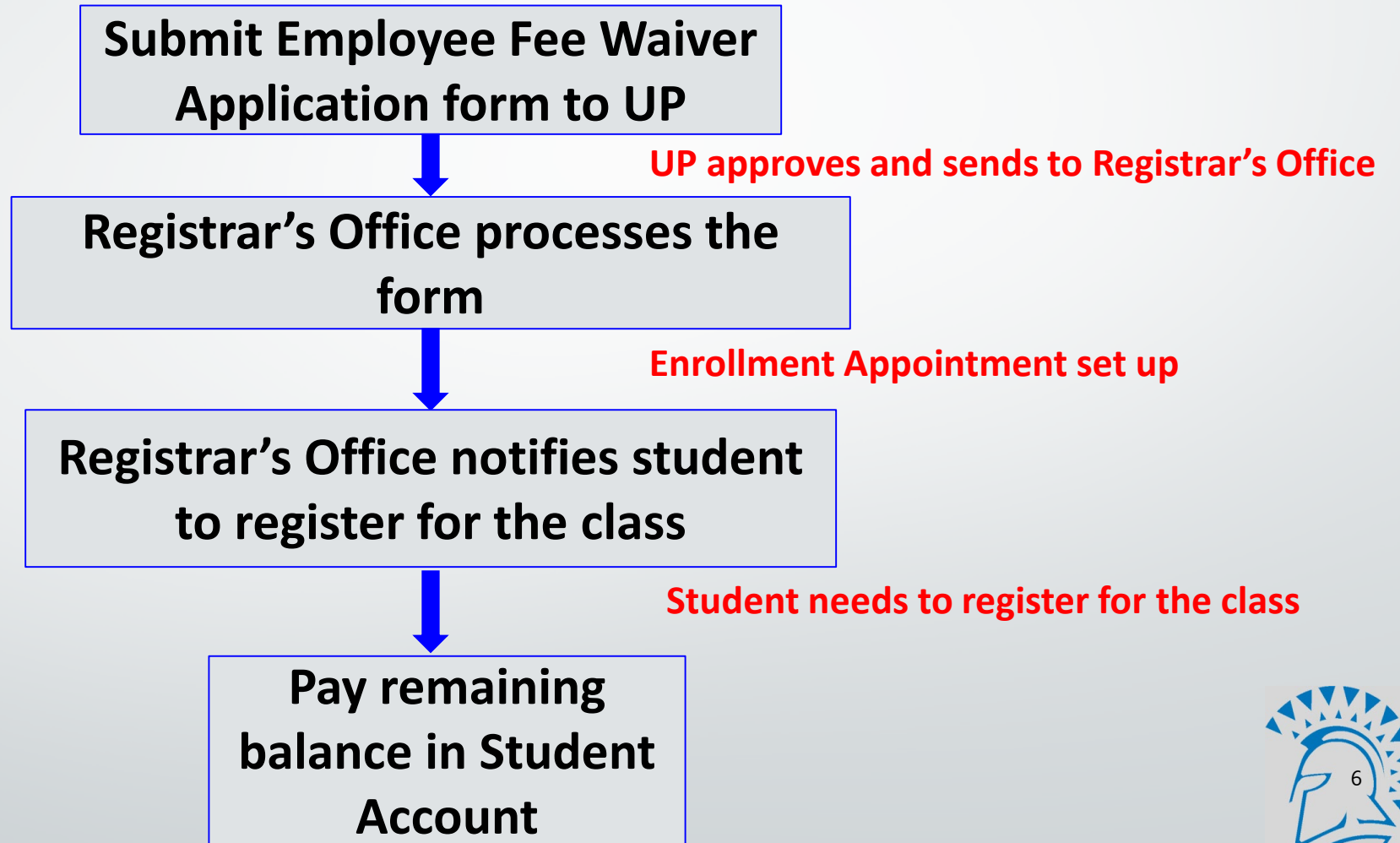


Job Related Fee Waiver

- Courses are taken to enhance an employee's performance in their current position
- Employee is not a matriculated (degree seeking) student
- Participant must be term-activated each semester by the Registrar's Office
- An [Employee Fee Waiver Application form](#) must be completed each semester to participate in the program
- Course(s) must be "**regular session**" to be fee waiver eligible

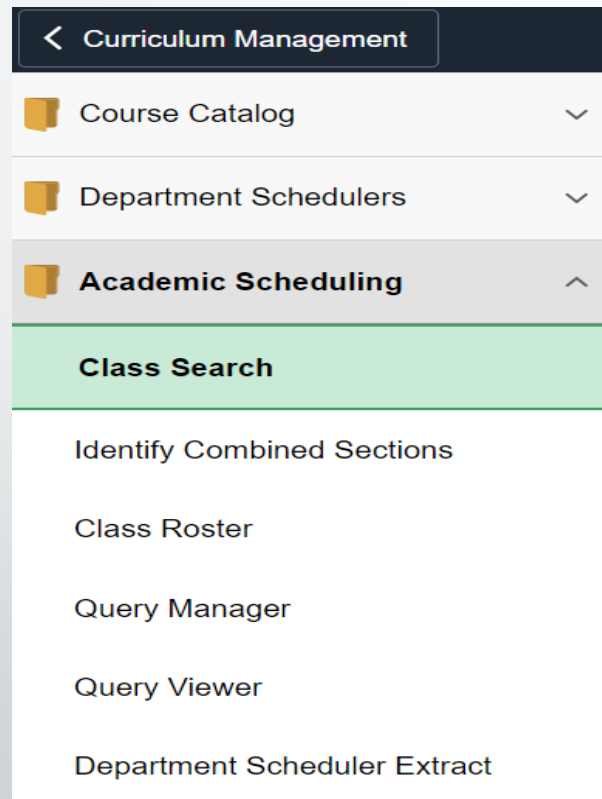


Job Related Fee Waiver Process



How to Search for Eligible Classes?

- Go to one.sjsu.edu
- Find the MySJSU PeopleSoft – CS
- Go to Curriculum Management → Academic Scheduling → Class Search



How to Search for Eligible Classes?

Curriculum Management

Search for Classes

Enter Search Criteria

Search for Classes

Institution

Term

Select at least 2 search criteria. Select Search to view your search results.

▼ Class Search

Subject

Course Number

Course Career

Show Open Classes Only

Session

Mode of Instruction


Class Nbr ?

▶ Additional Search Criteria



Look for “Regular” under “Section”

▼ ENGL 257 - Seminar in the History of Rhetoric

Class	Section	Days & Times	Room	Instructor	Meeting Dates	Status	View Textbooks	Zero Cost Materials
30394	02-SEM Regular	Th 4:00PM - 6:45PM TBA	Faculty Office 104 TBA	Ryan Skinnell Ryan Skinnell	01/25/2023 - 05/15/2023 01/25/2023 - 05/15/2023		View Textbooks	

- Course(s) must be “**regular session**” to be fee waiver eligible
- Special Session aren’t eligible for the fee waiver, except for those in the MLIS program & that student lives more than 50 miles away from SJSU. The MLIS Program will switch them to regular session.



Career Development Fee Waiver

- The employee has applied for and been accepted as a matriculated student working toward a degree or teaching credential.
- An employee may complete more than one degree through the Tuition Fee Waiver Program
- The employee must maintain good academic standing
 - 2.0 GPA or better for undergraduate students
 - 3.0 GPA or better for graduate students



Dependent Fee Waiver

- Eligible employees may transfer their fee waiver benefit to a dependent:
 - Spouse – no age limit
 - Registered Domestic Partner – no age limit
 - Child up to age 23
 - Unit 1 (Physicians)
 - Child up to age 25
 - Units 2,5,7,9 (CSUEU)
 - Unit 3 (Faculty)
 - Unit 4 (Academic Professionals)
 - Unit 6 (Teamsters)
 - Unit 8 (Public Safety)
 - M98 (Executive), M80 (Management), & C99 (Confidential)
- The dependent may attend any CSU Campus



Dependent Requirements

- The dependent must be a verified dependent of the employee
- The dependent must be a matriculated student getting a degree or a teaching credential
- The dependent must maintain good academic standing
 - 2.0 GPA or better for undergraduate students
 - 3.0 GPA or better for graduate students
- Fee Waiver may be only used by one person at a time



Who is Eligible?

Staff

- All full-time staff (permanent, temporary & probationary)
- All part-time permanent staff
- M98 (Executive) - Full-time or part-time permanent employees, and full-time probationary employees (does not apply to temporary)
- M80 (MPP) - All full-time managers (includes temporary)
- Confidential employees (C99) - All full-time & part-time permanent; however does not apply to temporary Confidential employees



Who is Eligible?

Faculty

- All tenured and tenure-track faculty
- FERP Faculty eligible during the semesters they are actively employed
- Temporary faculty with a 3-year appointment contract
- Coaches with at least 6 consecutive years of service





Waived

- State tuition for a maximum of 2 courses or 6 units, whichever is greater, per semester or quarter; quarter applies only to CalPoly SLO
- Campus Fees for Employees
- University application fee reimbursed (\$70), one time only for appropriate campus attending, must provide CalState Apply receipt
- MBA Graduate Professional Business Fees (\$270) per unit
- Other fees waived are different for each bargaining unit

Not covered

- Special Session or Open University courses (Summer & Winter)
- Lab or Class fees
- Orientation fees
- Late Add Fees
- Out of State Tuition
- First Day Solution



Tuition Fee Waiver Chart of Fees

FEES	Actual Fees	CRD 2,3,4,5,7,9	JBR 2,3,4,5,7,9	EFW 2,3,4,5,7,9 1 dependent	EW2 2,3,4,5,7,9 1 dependent	CRD4 1,6,8,10, 80,98,99	JBR4 1,6,8,10,80, 98,99	EFWN 1,6,8,10, 80,98,99 1 dependent	EWN2 1,6,8,10, 80,98,99 1 dependent	NRED 80,98, 99,MPP	NRED12 80,98,99, MPP 1 or 2 dependents
Tuition Fee-Under-P/T	1,665.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	N/A	N/A
Tuition Fee-Under-F/T	2,871.00	1,206.00	1,206.00	1,206.00	0.00	1,206.00	1,206.00	1,206.00	0.00	N/A	N/A
Tuition Fee-Grad-P/T	2,082.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	N/A	N/A
Tuition Fee-Grad-F/T	3,588.00	1,506.00	1,506.00	1,506.00	0.00	1,506.00	1,506.00	1,506.00	0.00	N/A	N/A
Tuition Fee-Cred-P/T	1,932.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	N/A	N/A
Tuition Fee-Cred-F/T	3,330.00	1,398.00	1,398.00	1,398.00	0.00	1,398.00	1,398.00	1,398.00	0.00	N/A	N/A
Tuition Fee-EducDoc	5,919.00	3,837.00	3,837.00	3,837.00	0.00	3,837.00	3,837.00	3,837.00	0.00	0.00	0.00
Tuition Fee-NursDoc-	7,635.00	5,553.00	5,553.00	5,553.00	0.00	5,553.00	5,553.00	5,553.00	0.00	0.00	0.00
Grad Prof Bus Prog Fee	\$270.00/unit	waived	waived	not waived	not waived	not waived	not waived	not waived	not waived	not waived	not waived
Associated Students	100.50	1.00	1.00	100.50	100.50	1.00	1.00	100.50	100.50	1.00	100.50
Student Union	391.50	1.00	1.00	391.50	391.50	1.00	1.00	1.00	1.00	1.00	1.00
Facility Fee	36.00	1.00	1.00	36.00	36.00	1.00	1.00	1.00	1.00	1.00	1.00
SSETF-IRA Fee	167.00	0.00	0.00	167.00	167.00	0.00	0.00	0.00	0.00	0.00	0.00
SSETF-Course Fee	34.00	0.00	0.00	34.00	34.00	0.00	0.00	0.00	0.00	0.00	0.00
SSETF-Student Success Fee	133.50	0.00	0.00	133.50	133.50	0.00	0.00	0.00	0.00	0.00	0.00
Health Services Fee	190.00	0.00	0.00	190.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00
Cross Enrollment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Document Fees-ID	5.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Document Fees-Transcript	9.00	0.00	0.00	9.00	9.00	0.00	0.00	8.00	8.00	0.00	8.00
Document Fees-Diploma	10.00	0.00	0.00	10.00	10.00	0.00	0.00	5.00	5.00	0.00	5.00
SIRF*	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Subtotal	1,078.50	5.00	5.00	1,073.50	1,073.50	5.00	5.00	117.50	117.50	5.00	117.50
STUDENT PAYS											
	Actual										
P/T Total	2,743.50	5.00	5.00	1,073.50	1,073.50	5.00	5.00	117.50	117.50	N/A	N/A
F/T Total	3,949.50	1,211.00	1,211.00	2,279.50	1,073.50	1,211.00	1,211.00	1,323.50	117.50	N/A	N/A
Grad-P/T Total	3,160.50	5.00	5.00	1,073.50	1,073.50	5.00	5.00	117.50	117.50	N/A	N/A
Grad-F/T Total	4,666.50	1,511.00	1,511.00	2,579.50	1,073.50	1,511.00	1,511.00	1,623.50	117.50	N/A	N/A
Cred-P/T Total	3,010.50	5.00	5.00	1,073.50	1,073.50	5.00	5.00	117.50	117.50	N/A	N/A
Cred-F/T Total	4,408.50	1,403.00	1,403.00	2,471.50	1,073.50	1,403.00	1,403.00	1,515.50	117.50	N/A	N/A
EducDoc-P/T Total	6,997.50	3,842.00	3,842.00	4,910.50	1,073.50	3,842.00	3,842.00	3,954.50	117.50	5.00	117.50
EducDoc-F/T Total	8,713.50	5,558.00	5,558.00	6,626.50	1,073.50	5,558.00	5,558.00	5,670.50	117.50	5.00	117.50
FEES WAIVED											
	Actual										
Under-P/T Total	2,743.50	2,738.50	2,738.50	1,670.00	1,670.00	2,738.50	2,738.50	2,626.00	2,626.00	N/A	N/A
Under-F/T Total	3,949.50	2,738.50	2,738.50	1,670.00	2,876.00	2,738.50	2,738.50	2,626.00	3,832.00	N/A	N/A
Grad-P/T Total	3,160.50	3,155.50	3,155.50	2,087.00	2,087.00	3,155.50	3,155.50	3,043.00	3,043.00	N/A	N/A
Grad-F/T Total	4,666.50	3,155.50	3,155.50	2,087.00	3,593.00	3,155.50	3,155.50	3,043.00	4,549.00	N/A	N/A
Cred-P/T Total	3,010.50	3,005.50	3,005.50	1,937.00	1,937.00	3,005.50	3,005.50	2,893.00	2,893.00	N/A	N/A
Cred-F/T Total	4,408.50	3,005.50	3,005.50	1,937.00	3,335.00	3,005.50	3,005.50	2,893.00	4,291.00	N/A	N/A
EducDoc-Total	6,997.50	3,155.50	3,155.50	2,087.00	5,924.00	3,155.50	3,155.50	3,043.00	6,880.00	6,992.50	6,880.00
NursDoc-Total	8,713.50	3,155.50	3,155.50	2,087.00	7,640.00	3,155.50	3,155.50	3,043.00	8,596.00	8,708.50	8,596.00



Fee Waiver Codes

Code	Type of Fee Waiver	Bargaining Unit
EFW	Dependent	2, 3, 4, 5, 7, & 9
CRD	Career Development	2, 3, 4, 5, 7, & 9
JBR	Job Related	2, 3, 4, 5, 7, & 9
EW2	Dependent – 2 parents work at CSU	2, 3, 4, 5, 7, & 9
EFWN	Dependent	1, 6, 8, 80, & 99
CRD4	Career Development	1, 6, 8, 10, 80, 98, & 99
JBR4	Job Related	1, 6, 8, 10, 99, 80, & 98
NRED	Career Development – Ed. D. program	80, 98, 99, & MPP
EWN2	Dependent – 2 parents work at CSU	1, 6, 8, 10, 80, 98, & 99
NRED12	Dependent – Ed. D. program	80, 98, 99, & MPP



Spring 2023 Basic Registration Fees

<https://www.sjsu.edu/bursar>

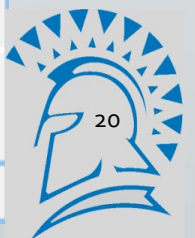
Mandatory Registration Fees	Doctoral Programs									
	Undergrad		Teacher Credential		Post-Bac/Grad		Education	Nursing	Audiology	Occupational Therapy
	Part-Time Rate 1.0-6.0 Units	Full-Time Rate 6.1 or More Units	Part-Time Rate 1.0-6.0 Units	Full-Time Rate 6.1 or More Units	Part-Time Rate 1.0-6.0 Units	Full-Time Rate 6.1 or More Units	One Rate 1.0 or More Units	One Rate 1.0 or More Units	One Rate 1.0 or More Units	One Rate 1.0 or More Units
Tuition Fee	\$1,665.00	\$2,871.00	\$1,932.00	\$3,330.00	\$2,082.00	\$3,588.00	\$5,919.00	\$7,635.00	\$7,371.00	\$8,598.00
<u>Student Association Fee</u>	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50	\$100.50
<u>Student Union Fee</u>	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50	\$391.50
<u>Health Ctr Facility Fee</u>	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00	\$36.00
<u>Document Fee</u>	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00
<u>SSETF-Student Success Excel Tech Fee</u>	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50	\$343.50
<u>Health Ctr Ops Fee</u>	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00	\$190.00
Totals	\$ 2,743.50	\$ 3,949.50	\$ 3,010.50	\$ 4,408.50	\$ 3,160.50	\$ 4,666.50	\$ 6,997.50	\$ 8,713.50	\$ 8,449.50	\$ 9,676.50



Spring 2023 Miscellaneous Fees

<https://www.sjsu.edu/bursar/fees-due-dates/tuition-other-fees/index.php>

Miscellaneous Fees		
Fee Type	Amount	Description
Administrative Fee	\$20.00	Assessed when payment is overdue
Course Fee	Varies	Additional fees or materials required pertaining to a particular course—determined by department/college offering course
Returned Check Fee (First Offense)	\$25.00	Assessed when check is returned from bank—first time
Returned Check Fee (Second Offense)	\$35.00	Assessed when check is returned from bank—second time
ID Replacement Fee	\$5.00	Assessed when requesting a new Tower Card to replace a card that has been lost or stolen
Installment Payment Plan Fee—Fall and Spring	\$35.00	Assessed as a one-time (per semester) processing fee included in the first installment
Late Registration Fee	\$25.00	Assessed when students add classes for the first time after the semester begins, but before the Add deadline
Late Enrollment Fee	\$45.00	Assessed when students add classes after the Late Registration deadline, but before census
Late Enrollment Fee	\$200.00	Assessed when students add classes after census, but before finals
Re-Enrollment Fee	\$40.00	Assessed when classes are administratively dropped by the Bursar's Office for non-payment and student wishes to attend SJSU the following term
Retroactive Add Fee	\$200.00	Assessed when students enroll in a class after the semester has ended



Types of Reimbursements

<https://www.sjsu.edu/bursar/payment-refunds/refunds.php>

The original method of payment to pay tuition will be used to refund any excess amount in the student account.

Process of Refunds

- **Direct Deposit:** Mondays, Wednesdays and Thursdays (3-5 days)
- **Checks mailed:** Tuesdays and Fridays (5-14 days)
- **Credit Card refunds:** Fridays (5-7 business days)

SJSU strongly encourages all students to enroll in [Direct Deposit](#) (eRefunds) as it is more secure and saves time with a processing time of just 3 to 5 banking days.



Career Development Fee Waiver

For example:

SJSU staff with a waiver code CRD, bargaining unit 7, registered for Spring 2023 term for two courses as a part-time undergrad student, 6 units or less:

Tuition	\$1,665.00
Campus Fees	<u>\$1,078.50</u>
	\$2,743.50
Fee waiver	<u>(\$2,738.50)</u>
Student pays	\$ 5.00



Doctoral Fee Waiver

For example:

An SJSU Assistant Professor has been accepted into an Educational Doctoral program (Ed.D.) with a tuition fee waiver code GRAD, CRD, Bargaining Unit 3 .

Tuition	\$5,919.00
Campus Fees	<u>\$1,078.50</u>
	\$6,997.50
Fee waiver	<u>(\$3,155.50)</u>
Student pays	\$ 3,842.00



Bursar Important Dates

<https://www.sjsu.edu/bursar/fees-due-dates/payment-due-dates/fall.php>

Spring 2023: Spring Payment Due Dates

Registration Period	Housing/Reg Charges Post to Acct	Payment Due Date	IPP Due Dates
Advance Registration Oct 25 - Jan 22	Oct 25 - Jan 12	Jan 17	Jan 17 Feb 17 Mar 20 Apr 17
	Jan 13 - Feb 14	Feb 17	Feb 17 Mar 20 Apr 17



Bursar Important Dates

<https://www.sjsu.edu/bursar/fees-due-dates/payment-due-dates/fall.php>

- For students who register after February 15, they will have three (3) days in which to pay from the date they register.
- No registration activity between January 23 and January 24.
- Late registration is between January 25 through February 20.
- Note: Failure to pay **all** outstanding tuition and fees by the due date may result in **all** classes being dropped. Students wishing to partially drop or withdraw from all classes must do so by following the university policies and procedures. We do not automatically drop classes after census.





Use of State Time

- At the Appropriate Administrator's (manager) discretion
- State time may be used to take one (1) on-campus class per semester
- Operational needs of the unit must be met first before use of State time is granted
- Appropriate Administrator may adjust employee's schedule to accommodate class attendance
- Appropriate Administrator may require classes to be taken during non-work hours



Fee Waiver Taxation

Employees will be taxed on the amount of state tuition **fees waived** in the following circumstances:

Eligible Participant	Course Level(s)	Tax Status
CSU Employee	Undergraduate	Nontaxable
	Graduate or Credential	Nontaxable up to \$5,250
Employee's Spouse/Dependent Child	Undergraduate	Nontaxable
	Graduate or Credential	Taxable
Employee's Domestic Partner	Undergraduate	Taxable
	Graduate or Credential	Taxable



Fee Waiver Taxation

Example: SJSU employee's graduate fees waived in 2022 total \$6,268.00.

Taxation calculation:

Total Value of Fees Waived	\$6,268.00
Threshold Amount	<u>(\$5,250.00)</u>
Total Taxable Fees	\$1,018.00
Flat tax rate	x <u>36.25%</u>
Imputed Tax Value	\$369.00 *

*** Withheld from two consecutive paychecks - \$184.00 deduction each month before the end of each term. Email notices will go out to the employee to notify them as appropriate.**



Fee Waiver Taxation

- The Tuition Fee Waiver Program is a fringe benefit and as such has strict reporting requirements established by the Internal Revenue Service [Internal Revenue Code Sections 117(d), 127 and 132(d)] and the State of California Controller's Office.
- The reporting requirements state that the fringe benefit must be taxed in the calendar year in which the benefit was received.

Type	Percentage
Federal	22%
State	6.6%
Social Security	6.2% (if the employee is subject to this tax on normal wages)
Medicare	1.45% (if the employee is subject to this tax on normal wages)
Total Flat Tax Rate	36.25%



Tuition Fee Waiver Applications

Available on our [Tuition Fee Waiver](#) website:

- [Employee Fee Waiver Application \(DocuSign\)](#)
- [Employee Dependent Fee Waiver Application \(DocuSign\)](#)
- [Employee Fee Waiver Change of Course\(s\) form \(DocuSign\)](#)



Fee Waiver Deadlines

Deadlines	Date
First day accepting Spring 2023 applications	11/14/2022
First day the Bursar's Office begins waiving fees	11/21/2022
Last day University Personnel accepts fee waiver applications for the semester	2/20/2023
Last date for the Bursar's Office to waive fees	2/21/2023
Attending another CSU	Check with your CSU Campus
Summer/Winter deadlines	Please consult with the Fee Waiver Coordinator



Benefits of the Program

- Obtain a degree while you work at SJSU
- Attend any CSU to get a degree
- Career growth opportunities
- Transfer the benefit to your eligible dependent



SJSU Fee Waiver Contacts

Bursar's Office – all fee related inquiries

Jay Ramirez: Roland.Ramirez@sjsu.edu

Accounting Technician

Website: [Bursar's Office](#)

Phone: 408-924-1601

Email: student-sponsors-waivers@sjsu.edu



SJSU Fee Waiver Contacts

Registrar's Office – for all registration related inquiries

Last name begins with **A - Mars**: Sophie Lanh: Sophie.Lanh@sjsu.edu

Last name begins with **Mart - Z**: Taylor Taft: Taylor.Taft@sjsu.edu

University Personnel:

Michele Delfino, Fee Waiver Coordinator

Michele.Delfino@sjsu.edu

408-924-1706

Email: fee-waiver@sjsu.edu



Questions?

