



# CALIFORNIA STATE UNIVERSITY, LONG BEACH

Subject: <b>Fee Waiver</b>	
Department: <b>Staff Human Resources</b>	Reference No.:
Division: <b>Administration &amp; Finance</b>	Issue Date: <b>November 1993</b>
References: <b>Collective Bargaining Agreements</b>	Revision Date: <b>January 2007</b>
Web Links: <b>Collective Bargaining Agreements</b>	Expiration Date: <b>NA</b>

## PURPOSE OF THE FEE WAIVER PROGRAM

California State University, Long Beach actively promotes career and professional development for staff employees through the University's **Fee Waiver Program**. This program, established in 1975, allows eligible staff members to "learn while they earn" and attend classes at CSULB or other CSU campuses for greatly reduced rates. CSULB employees who want to enhance job skills, prepare for future careers, or realize dreams of earning a bachelor's or graduate degree are encouraged to participate in this program.

## STAFF ELIGIBILITY REQUIREMENT

Table #1

Eligibility Criteria	Employee Category
<ul style="list-style-type: none"> <li>Full time permanent and probationary employees</li> <li>Full time temporary employees (if employee's appointment exceeds his/her last day of the semester in which the employee is enrolled)</li> <li>Part-time permanent employees</li> </ul>	Units 2, 4, 5, 6, 7, 9, and 10
<ul style="list-style-type: none"> <li>Full time or part-time permanent employees</li> <li>Full time probationary employees (no temporary)</li> </ul>	Units 1 and 8 Confidential (C99)* Excluded (E99)* Executive (M98)
<ul style="list-style-type: none"> <li>Full time employees (includes temporary)</li> </ul>	MPP (M80)

\*Part-time C99 and E99 employees are eligible only if they have attained permanent status in their full time position, and subsequently, reduced their time base to part-time.



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## **Employees who are not eligible for the Fee Waiver Program are:**

- Those with emergency appointments
- College Work Study Students
- Student Assistants
- Foundation or other auxiliary employees
- Part-time temporary employees.

Information about the Fee Waiver Program is included under different articles depending on the particular Collective Bargaining Agreement or Memorandum of Understanding.

## **EDUCATIONAL TRACKS IN THE FEE WAIVER PROGRAM**

There are two tracks in the Fee Waiver Program: Work-related classes or as part of a Career Development Plan.

**Work-Related courses** are classes that directly improve skills and/or enhance knowledge for performing job duties in an employee's **current position**. An employee may also take courses to acquire new skills needed to perform new duties and responsibilities. Enrollment may be voluntary or at the direction of the employee's supervisor or manager.

**A Career Development Plan** provides the framework for systematic growth and professional development. A Career Development Plan should ensure progress toward career objectives. The primary responsibility for creating a Career Development Plan rests with the employee. While job promotions are not guaranteed as a result of completing courses in the Career Development Plan, an employee may be better prepared and more competitive when applying for job vacancies as a result of having completed specific courses or a degree program. Classes as part of a Career Development Plan must be taken for academic credit.

## **RESTRICTIONS UNDER THE FEE WAIVER PROGRAM**

Under the Fee Waiver Program, fees are waived only for classes offered in the:

- Fall Academic Semester
- Spring Academic Semester
- Summer Session

All classes must be taken for grades or credit/no credit. Employees are not permitted to audit any classes taken through this program.



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Fees for the following classes **are not waived** under any circumstances:

- Winter Intersession
- Other University College and Extension classes (UCES) during Spring and Fall Semesters

**NOTE:** Employees who separate from the University or otherwise become ineligible (i.e., change in employment status) before or during the eighth week of the academic semester shall be required to reimburse the University for any fees normally waived under the Fee Waiver Program.

## NUMBER OF CLASSES ALLOWED

The Fee Waiver Program allows eligible employees to enroll in a maximum of two courses or six units, whichever is greater, per semester (except Unit 6 employees who can enroll in a maximum of two courses per semester). However, eligible employees on an approved educational leave of absence without pay may be permitted to enroll in more than two courses or six units per semester. The Fee Waiver Administrator will determine the maximum number of units an employee can be enrolled in depending upon the time base of the educational leave.

## USE OF STATE TIME FOR CLASS ATTENDANCE

Permission may be granted for an employee to use a reasonable amount of work time for one work-related or approved career development course per semester. Approval may be granted if the employee's appropriate administrator determines that the operational needs of the department will be met in an orderly and normal manner.

## FEES

The Basic Registration Fees may be waived for a maximum of two courses or six units, whichever is greater, per semester (except Unit 6 employees can enroll in a maximum of two courses per semester). If the employee chooses to take other classes in addition to those covered under the Fee Waiver Program, the employee will be responsible for:

- Paying any difference between the amount waived and the full Basic Registration Fees, and
- Paying any late registration fees if appropriate registration deadlines are not met. (See a current Schedule of Classes for exact fee amounts).

Note: Courses taken for either a Work-Related or Career Development reason will be tax-free.

## CSULB ADMISSIONS AND APPLICATION PROCEDURES

If an employee wishes to be admitted as a student to a CSULB academic program and qualifies in accordance with established admission standards and criteria, the application will be processed by the Office of Enrollment Services as a regular admission. The CSU Application Fee will be waived if an employee is eligible. (See Sample Form #1.)



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## ADMISSIONS FOR THE WORK-RELATED COURSES

The employee is required to fill out the front part of "A" on the Admissions Application. Transcripts do not need to be submitted nor are placement tests required. The Admissions Office establishes a file and Permanent Record Card for each employee admitted for this purpose. The Admissions Office will not calculate employee's course credit toward a degree. The Fee Waiver Questionnaire form (see sample form #3 - **the Job Related section**) along with the Staff Registration Fee Waiver form must be completed. If the employee subsequently wants to declare a career objective (credit toward a degree), the employee needs to submit a fully filled out admissions application along with the necessary paperwork (i.e. transcripts) for regular admission and be matriculated at CSULB.

## ADMISSIONS FOR CAREER DEVELOPMENT PLAN COURSES

Admission for the purpose of enrolling in courses to get credit toward a degree requires the approval of the Fee Waiver Administrator. CSU admission requirements must be met or waived by the appropriate administrator in the Office of Enrollment Services. Necessary documents for matriculation (transcripts of previous work, test scores, evaluation of transfer credit, etc.) must be submitted to the Office of Enrollment Services. The Fee Waiver Questionnaire form (see sample form #3 - **the Career Development Plan section**) along with the Staff Registration Fee Waiver form must be completed.

## INTERCAMPUS ENROLLMENTS FOR STAFF

In some instances, the employee may wish to enroll, on his/her own time, at a CSU campus other than CSU Long Beach. In such cases, the Office of Staff Human Resources can provide the employee with written certification verifying the employee's Fee Waiver eligibility (See Sample Form #4a). The employee must provide this certification to the CSU campus of choice and follow the policy of the campus of enrollment. The campus of enrollment makes the final admission decisions.

## EVALUATION

At the close of each semester, the Fee Waiver Administrator in the Office of Staff Human Resources will conduct an evaluation of the performance in courses taken through the Fee Waiver Program. This may include a review of the grade(s) received for the course(s) taken. In order for an employee to continue participating in this program, normal academic standards must be maintained. A repeated pattern of an employee dropping classes may be cause for withholding further approval for participation in the Fee Waiver Program.



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### STAFF DEPENDENT FEE WAIVER (FOR STAFF NOT COVERED UNDER THE CSUEU CONTRACT)

Employees who are eligible for the Fee Waiver Program can transfer their existing fee waiver benefit entitlement maximum to a dependent child/spouse/domestic partner. Dependents of Unit 10, E99, and Unit 8's domestic partner are not eligible at this time (see table #2 on page 11). The eligibility requirements for employee's dependent child/spouse/domestic partner are subject to the following conditions:

- Employee's \*dependent child/spouse /\*\*domestic partner must be claimed as a dependent on employee's health benefit or Income Tax. (Copy of necessary documentation will be requested for verification purposes.)
  - \* Dependent child is defined as (1) your child or stepchild under age 23 who has never been married; (2) a child living with you in a parent-child relationship who is economically dependent upon you, under age 23 and has never been married; (3) your child or stepchild age 23 or above who is incapable of self-support due to a disability which existed prior to age 23.
  - \*\* The benefit eligibility for a domestic partner is contingent upon the employee having a Declaration of Domestic Partnership on file with the California Secretary of State. (Copy of necessary documentation will be requested for verification purposes.)
- The courses taken by a dependent child/spouse/domestic partner have to be matriculated toward a degree or teaching credential.
- Fee waiver eligibility may be transferred to only one person per employee per semester, regardless of whether that individual uses the full entitlement of two (2) courses or six (6) units.
- If both parents are employed in the CSU system and are eligible to transfer their fee waiver benefit to a dependent child, each employee may transfer the benefit. Therefore, it is possible for one child to receive both benefits and be eligible to enroll in up to four (4) courses or twelve (12) units, whichever is greater, on a fee waiver basis. Alternatively, each employee could transfer his or her benefit to a different child, and each child would be entitled to up to two (2) courses or six (6) units of fee waiver eligibility.
- This fee waiver benefit applies only to CSU campuses.
- The dependent fee waiver applies only to certain fees incurred by California residents. Thus, the dependent child/spouse/domestic partner who does not meet established in-state residency requirements (and who does not qualify for classification as resident in accord with the provisions of Title 5, Section 41910, California Code of



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Regulations) will be responsible for paying non-resident tuition charges based upon the total number of units enrolled.

- A dependent child/spouse/domestic partner taking courses in addition to the fee waiver courses shall pay any difference in fees. All other fees shall be at the regular rates.
- The administration determines whether there is space available in requested course offerings for the dependent child/spouse/domestic partner.
- Normal academic standards must be maintained by the dependent child/spouse/domestic partner in order to continue participating in the Fee Waiver Program.

### **STAFF DEPENDENT FEE WAIVER (FOR CSUEU STAFF MEMBERS ONLY)**

Employees who are eligible for the Fee Waiver Program can transfer their existing fee waiver benefit entitlement maximum to a dependent child/spouse/domestic partner. The eligibility requirements for employee's dependent child/spouse/domestic partner are subject to the following conditions:

- Employee's \*dependent child/spouse /\*\*domestic partner must be claimed as a dependent on employee's health benefit or Income Tax. (Copy of necessary documentation will be requested for verification purposes.)
  - \* Dependent child is defined as (1) your child or stepchild under age 25 who has never been married; (2) a child living with you in a parent-child relationship who is economically dependent upon you, under age 25 and has never been married; (3) your child or stepchild age 25 or above who is incapable of self-support due to a disability which existed prior to age 25.
  - \*\* The benefit eligibility for a domestic partner is contingent upon the employee having a Declaration of Domestic Partnership on file with the California Secretary of State. (Copy of necessary documentation will be requested for verification purposes.)
- The courses taken by a dependent child/spouse/domestic partner have to be matriculated toward a degree or teaching credential.
- Fee waiver eligibility may be transferred to only one person per employee per semester, regardless of whether that individual uses the full entitlement of two (2) courses or six (6) units.
- If both parents are employed in the CSU system and are eligible to transfer their fee waiver benefit to a dependent child, each employee may transfer the benefit. Therefore, it is possible for one child to receive both benefits and be eligible to enroll in up to four (4) courses or twelve (12) units, whichever is greater, on a fee



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waiver basis. Alternatively, each employee could transfer his or her benefit to a different child, and each child would be entitled to up to two (2) courses or six (6) units of fee waiver eligibility.

- This fee waiver benefit applies only to CSU campuses.
- The dependent fee waiver applies only to certain fees incurred by California residents. Thus, the dependent child/spouse/domestic partner who does not meet established in-state residency requirements (and who does not qualify for classification as resident in accord with the provisions of Title 5, Section 41910, California Code of Regulations) will be responsible for paying non-resident tuition charges based upon the total number of units enrolled.
- A dependent child/spouse/domestic partner taking courses in addition to the fee waiver courses shall pay any difference in fees. All other fees shall be at the regular rates.
- Normal academic standards must be maintained by the dependent child/spouse/domestic partner in order to continue participating in the Fee Waiver Program.

## DEPENDENTS FEE STRUCTURE

In accordance with various sections of the Education code, CSU policy, or Collective Bargaining Agreements, some fees that are waived for employees cannot be waived for other individuals due to statutory restrictions.

Table #2

Employee Category	Eligible Dependents for fee Waiver Transfer	Fees Fully Waived for Eligible Dependents	Fees Reduced to \$1.00 for Eligible Dependents
<ul style="list-style-type: none"> <li>• Unit 1 &amp; C99 Full time or part-time perm (no temp) employees</li> <li>• M80 Full time employees (includes temp)</li> <li>• M98 Full time or part-time perm (no temp) employees</li> </ul>	Dependent Child Spouse Domestic Partner	Application Fee Identification Card Fee Instructionally Related Activity Fee Health Services Fee State University Fee	Student Body Center Fee/Student Union Fee Health Facilities Fee
<ul style="list-style-type: none"> <li>• Unit 4 Full time perm or temp Part-time perm employees</li> <li>•</li> </ul>	Dependent Child Spouse Domestic Partner	Application Fee Identification Card Fee Instructionally Related Activity Fee State University Fee	Student Body Center Fee/Student Union Fee Health Facilities Fee



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<ul style="list-style-type: none"> <li>Unit 8 Full time or part-time perm (no temp) employees</li> </ul>	Dependent Child Spouse ( <b>no</b> Domestic Partner)	Application Fee Identification Card Fee Instructionally Related Activity Fee Health Services Fee State University Fee	Student Body Center Fee/Student Union Fee Health Facilities Fee
<ul style="list-style-type: none"> <li>Units 2, 5, 6, 7 &amp; 9 Full time perm or temp Part-time perm employees</li> </ul>	Dependent Child Spouse Domestic Partner	Application Fee Identification Card Fee State University Fee	N/A

### TAX ISSUES

By coordinating the Internal Revenue Code Sections 117(d), 127, and 132(d), under the CSU Fee Waiver and Reduction Program, the following tax-free or taxable benefits are available to CSU employees and their eligible dependent children, spouses, and/or domestic partners:



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Table #3

<b>Eligible Participant</b>	<b>Course Level(s)</b>	<b>Tax Status</b>
CSU Employee	Undergraduate & Graduate	Nontaxable
Employee's Spouse/Dependent Child	Undergraduate	Nontaxable
	<i>Graduate</i>	<i>Taxable</i>
Employee's Domestic Partner	<b>Undergraduate Graduate</b>	<b>Taxable Taxable</b>

Note: It is the **level of the course** that determines taxability.

The Chancellor's Office requires taxable benefit (income) for employee's spouse/dependent child/ domestic partner be withheld from employee's pay warrant.

## **ADDITIONAL CAMPUS SERVICES**

The Academic Advising Center, located in the Horn Center, provides information on general education requirements, University rules and regulations, and graduation requirements. For more information, please call 985-4837.

Counseling and Psychological Services, located in BH 226, is available to help with personal and emotional concerns as well as to assist in making educational and vocational decisions. For more information, please call 985-4001.

The Career Planning and Placement Center, located in BH 250, can advise in career planning, resume preparation, and interviewing techniques. For more information, please call 985-4151.

The Graduate Center for Public Policy and Administration, located in SS/PA 159, offers seminars and courses during the semester for professionals working toward an advanced degree or special certificate. For more information, please call 985-4177.

The Adult Re-entry Program, located in BH 289, is designed to assist adults over age 25 enter or re-enter the University. Admission and registration assistance, educational and career planning, personal counseling, and continued support services are all offered through this program. For more information, please call 985-5358.

For any other Staff Fee Waiver Program information, please call the Fee Waiver Program Administrator at 562-985-4031.

**FORMS:** Fee Waiver Forms