



## California State University, Long Beach FACULTY FEE WAIVER PROGRAM APPLICATION

(The Faculty Fee Waiver Program Application form **MUST BE COMPLETED EACH TERM** in order to utilize/transfer employee fee waiver benefits)

### FACULTY MEMBER INFORMATION

Name (Last, First): PLEASE PRINT CLEARLY	Campus ID Number:
	Telephone Number:
Department Name:	E-Mail Address:

\_\_\_\_\_  
(Signature of Faculty Member)

\_\_\_\_\_  
Date

Your signature(s) certify that you have reviewed the guidelines and conditions of the faculty fee waiver program on the reverse side of this form.

### SPOUSE/DEPENDENT CHILD/DOMESTIC PARTNER INFORMATION

Name (Last, First): PLEASE PRINT CLEARLY	Relationship:
	Campus ID Number (last 4-digit SS# if no Campus ID):
	E-Mail Address:
Home/Mailing Address:	Telephone Number:
	Alternate Telephone Number:
	Birth Date (if dependent child):

\_\_\_\_\_  
(Signature of Faculty Member)

\_\_\_\_\_  
Date

I wish to transfer my fee waiver eligibility, as provided in the Faculty/Unit 3 Memorandum of Understanding, to my spouse or dependent child or domestic partner. I certify that the individual is my legal spouse or "dependent child" as that term defined below. \* I understand this transfer prohibits my personal use of fee waiver or the transfer of this benefit to any other dependent during the term(s) indicated below.

\*NOTE: A dependent child is defined as (1) your child/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/stepchild age 25 or above who is incapable of self-support due to a disability which existed prior to age 25.

### FACULTY ELIGIBILITY

Current Eligible Status as (please check **ONE** box ONLY):

Tenured/Probationary     Temporary Lecturer \*     FT Management Personnel Plan     Coach\*\*

\*Three (3) Year Appointment. \*\* Faculty unit employees with six (6) years of consecutive service in the department.

### ENROLLMENT DETAILS

CSU Campus of Enrollment :	Semester/Quarter:	Year:
Degree/Credential Objective: <input type="checkbox"/> Undergraduate <input type="checkbox"/> Graduate <input type="checkbox"/> Doctorate <input type="checkbox"/> 2nd Bachelor	Enrollment Status: <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time	Number of Units:

### VERIFICATION OF ELIGIBILITY

**(TO BE COMPLETED BY FACULTY AFFAIRS ONLY)**

Collective Bargaining Unit:     Unit 3 (Tenured/Probationary, Librarian, Temporary Lecturer, Coach)     MPP

Employment Status : <input type="checkbox"/> Tenured/Probationary <input type="checkbox"/> FERP <input type="checkbox"/> Librarian <input type="checkbox"/> 3-YR Lecturer <input type="checkbox"/> Coach	Eligible Benefit: <input type="checkbox"/> 6 Units <b>OR</b> <input type="checkbox"/> 2 Courses <input type="checkbox"/> No Unit Limitation	Additional Information (if applicable):	<input type="checkbox"/> Combine/Full Eligibility - (two qualified employees)
---	---	---	---

The faculty member noted above is eligible to participate in the fee waiver program; and, thus, may transfer fee waiver eligibility to a dependent. The faculty noted above has not transferred his or her fee waiver eligibility to any other dependent for the period noted.

(562) 985-8114

\_\_\_\_\_  
(Signature Approval – Natalie Bersig, Director, Faculty Affairs)

\_\_\_\_\_  
Telephone Number

# Faculty Fee Waiver Program

[Unit 3]



Eligible faculty unit employees may be granted approval to enroll at any CSU campus under the **Faculty Fee Waiver Program** for two (2) courses or six (6) units, whichever is greater, per term, excluding the doctoral program (Ed.D.). Units for the doctoral program are determined independently based on program course offerings. Please review Article 26, CSU-CFA Collective Bargaining Agreement for further information at:

[www.calstate.edu/LaborRel/Contracts\\_HTML/CFA\\_CONTRACT/2012-2014/](http://www.calstate.edu/LaborRel/Contracts_HTML/CFA_CONTRACT/2012-2014/)

## Faculty Eligibility (Active Employee)

- Tenured and Probationary faculty unit employees
- Temporary faculty unit employees with a three (3) Year Appointment
- Full-Time Management Personnel Plan
- Coaches with at least six (6) consecutive years of service in the department

## Transfer of Eligibility

Faculty eligible for participation in the Fee Waiver Program may transfer their existing Fee Waiver benefit entitlement to a spouse, dependent child, or domestic partner under certain conditions.

- Eligibility may be transferred to a spouse OR a dependent child OR domestic partner.  
*[ "Dependent Child" defined: (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" ].*
- Fee waiver benefits may be transferred to one person only, regardless of whether that individual uses the full entitlement of six units. One spouse or one child or domestic partner who uses less than three units of entitlement exhausts the entire entitlement for that semester.
- If both parents are eligible faculty, each parent may transfer his/her fee waiver benefit to the same eligible dependent or to two different eligible dependents.

## Conditions of Fee Waiver

- Participant **must be matriculated** toward a degree and the course(s) enrolled in on a fee-waiver basis must be for credit toward completion of that degree's requirement. Participating employee (self) in a job-related courses shall relate to the current assignment that will benefit the campus.
- Participant taking classes leading to the attainment of a teaching credential is also eligible for fee waiver enrollment.
- The fee waiver is applicable to state-supported (general fund) courses ONLY. The benefit does not apply to non-resident tuition fees or self-support programs offered through extended education.
- Campus administration must determine that space is available in a particular class for the dependent.

## Continued Eligibility

- Normal academic standards must be maintained in order to continue participating in the fee waiver program.
- Must have a valid active employment/contract.

## Fees:

**Faculty (Self)** - The following fees are reduced to \$1.00: Associated Student Body Fee, University Union Fee, and Health Facilities Fee

**Spouse/Dependent-Child/Domestic Partner:** The following fees shall not be waived: Student Body Fee, University Union Fee, and Health Facilities Fee. [A spouse, dependent child, or domestic partner taking CSU courses in addition to fee waiver courses shall pay the difference between the part-time State University Fee and the full-time State University Fee.]

## READ - IMPORTANT: Tax Issues Related To Enrollment

Faculty unit employees, spouses/dependent child/domestic partners may enroll in undergraduate and graduate level courses. Educational assistance payments for fee waiver participants taking graduate level courses are considered taxable income. The taxes will be deducted out of your pay warrant. All undergraduate and graduate level coursework taken by an employee's dependent, spouse, or domestic partner through the Fee Waiver Program is also taxable. [ Internal Revenue Code (IRC Sections 117(d), 127, and 132(d) ) ]. Please contact your tax specialist or accountant for further information.

The Faculty Fee Waiver Program Application form **MUST BE COMPLETED EACH TERM** in order to transfer employee fee waiver benefits.

8/1/2013