



## **CSU Employee Fee Waiver and Reduction Program – Frequently Asked Questions**

### **1. What is the CSU Employee Fee Waiver and Reduction Program?**

The California State University (CSU) Fee Waiver and Reduction Program (Fee Waiver) was established in 1975 to provide eligible CSU employees with the opportunity to enroll in work-related courses necessary for improving skills applicable to existing employment with the CSU or necessary for advancement in the CSU in accordance with an approved individual career development plan as a career employee in the CSU. Additionally, the Fee Waiver and Reduction Program provides eligible dependents of CSU employees the opportunity to attend classes at CSU campuses at reduced rates.

### **2. What options are available under the CSU Employee Fee Waiver and Reduction Program?**

There are three options offered under the CSU Employee Fee Waiver and Reduction Program:

- **Work-Related Courses:** Work-related courses are classified as coursework that is necessary for improving skills for existing employment with the CSU. Taking courses for the purposes of obtaining a degree is not required under this avenue. Admission for the purpose of enrolling in courses deemed work-related shall be with the approval of the appropriate campus administrator.
- **Career Development Courses:** Career Development courses are classified as coursework established by the employee and an appropriate advisor of choice and shall be subject to approval by the appropriate administrator in the Human Resource Office. Admission for the purpose of enrolling in courses, as part of an approved individual career development plan, shall be with the approval of the President or designee. These employees shall be required to complete all the forms necessary for regular admission and matriculation at a campus of the California State University if their career development objective requires a degree.
- **Dependent Tuition Fee Waiver Transfer:** Employees eligible for the CSU Tuition Fee Waiver program may transfer their existing tuition fee waiver benefit to one eligible dependent each term. The dependent must be a matriculating student working toward a degree at a CSU campus and taking courses for credit to meet the degree's requirements. While participating in this program, the employee may not participate in the Work Related or Career Development Program for that term.

### **3. Who is eligible for the CSU Employee Fee Waiver and Reduction Program?**

Eligibility criteria for represented and non-represented employee categories vary and are based on Collective Bargaining Agreements (CBA) for represented employees and Policy for non-represented employees as summarized on the following chart:

<b>Employee Category</b>	<b>Eligibility Criteria</b>
<b>Represented Employees</b>	
Unit 1 (Physicians)	All unit members
Units 2, 5, 7, 9 (CSUEU) Unit 4 (Academic Professionals) Unit 6 (Skilled Trades)	Full-time employees (i.e., permanent, temporary, & probationary) and part-time permanent employees
Unit 3 (Faculty) – Non FERP	Tenured and probationary faculty unit employees (excluding coaches), and temporary faculty unit employees with three (3) year appointments pursuant to Article 12 of the CBA. Coaches must have at least six (6) years of consecutive service in the department.
Unit 3 (Faculty) – FERP Only	FERP (Faculty Early Retirement Program) participants are considered tenured faculty and are eligible for fee waiver only during the semesters/quarters when they are actively employed. Timebase is not a factor.

Unit 8 (Public Safety)	Full-time or part-time permanent employees, and full-time probationary employees (does not apply to temporary)
<b>Non-Represented Employees</b>	
M98 (Executive)	Full-time or part-time permanent employees, and full-time probationary employees (does not apply to temporary)
M80 (MPP)	Full-time employees (includes temporary)
C99 (Confidential) E99 (Excluded)	Full-time or part-time permanent employees, and full-time probationary employees (does not apply to temporary)  C99 and E99 employees only attain permanent status in part-time positions as a result of completing a probationary period in a full-time position and, subsequently, reducing their time-base.

Overall, in order to participate in the Fee Waiver Program, employees must have an active appointment that is eligible for Fee Waiver. If you separate from CSU before the beginning of the semester, you will no longer be eligible for the benefit. The Fee Waiver will be removed and your bill will be adjusted accordingly. You can complete your course(s) by paying the fees due or drop the course(s).

Note: Please check applicable CBAs for provisions concerning the appointment of part-time, permanent employees. Also note that Executive Order 712 establishes the requirement that courses taken by employees participating in the Fee Waiver Program must either be job-related or part of an approved Career Development Plan. Refer to the Executive Order as well as to the individual CBAs for more information on this requirement.

#### 4. Who is an eligible dependent to receive the transfer of benefit under the CSU Employee Fee Waiver and Reduction Program?

Eligible employees may transfer their fee waiver benefit to a spouse, dependent child (within applicable age limits, and never been married) or registered domestic partner, as noted in the following table:

<b>Employee Category</b>	<b>Eligibility Fee Waiver Dependent</b>
<b>Represented Employees</b>	
Unit 1 (Physicians)	Spouse Dependent Child (up to age 23) Registered Domestic Partner
Units 2, 5, 7, 9 (CSUEU) Unit 3 (Faculty) Unit 4 (Academic Professionals) Unit 6 (Skilled Trades) Unit 8 (Public Safety)	Spouse Dependent Child (up to age 25) Registered Domestic Partner
<b>Non-Represented Employees</b>	
C99 (Confidential) M80 (MPP) M98 (Executive)	Spouse Dependent Child (up to age 25) Registered Domestic Partner
E99 (Excluded)	N/A

Normal academic standards must be maintained by the spouse, registered domestic partner or dependent child in order to continue participating in the fee waiver program.

#### 5. What type of courses may be taken under the CSU Employee Fee Waiver and Reduction Program?

Fee waiver applies to CSU state-supported (general fund) courses only, including state-supported courses that are offered through summer term. Courses in self-support (i.e. Extended Education) programs may not be taken through the CSU Employee Fee Waiver and Reduction Program. In addition, fees for joint doctoral programs that are paid directly to the “partner” university cannot be waived under the CSU Employee Fee Waiver and Reduction Program.

**6. What is the unit limitation under the CSU Employee Fee Waiver and Reduction Program?**

All eligible non-represented and represented employees may enroll in a maximum of two (2) courses or six (6) units, whichever is greater, per term, excluding the Ed.D. Program. Units for the Ed.D. Program are determined independently based on program course offerings.

**7. What is the fee schedule under the CSU Employee Fee Waiver and Reduction Program?**

Fees waived or reduced under the CSU Fee Waiver Program vary for represented and non-represented employee categories and are based on collective bargaining agreements for represented employees and policy for non-represented employees as follows:

<b>Employee Category</b>	<b>Fees Fully Waived</b>	<b>Fees Partially Waived**</b>	<b>Fees Reduced to \$1.00</b>
Unit 1 (Physicians)	<ul style="list-style-type: none"><li>• Application Fee</li><li>• Health Services Fee</li><li>• Identification Card Fee</li><li>• Instructionally Related Activity Fee</li><li>• State University Tuition Fee*</li></ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"><li>• Associated Student Body Fee</li><li>• University Union Fee</li><li>• Health Facilities Fee</li></ul>
Units 2, 5, 7, 9 (CSUEU)	<ul style="list-style-type: none"><li>• Application Fee</li><li>• Health Services Fee</li><li>• Identification Card Fee (if mandatory)</li><li>• State University Tuition Fee*</li><li>• Instructionally Related Activity Fee</li><li>• Professional Program Fee (Graduate Fee)</li><li>• All other Category I and II fees as defined in Executive Order No.1054 (excluding the Doctoral Program Fee and the Non-Resident Tuition unless eligible through Title 5, Section 41910).</li></ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"><li>• Associated Student Body Fee</li><li>• University Union Fee/Student Body Center Fee</li><li>• Health Facilities Fee</li></ul>
Unit 3 (Faculty)	<ul style="list-style-type: none"><li>• Application Fee</li><li>• Health Services Fee</li><li>• Identification Card Fee</li><li>• Instructionally Related Activity Fee</li><li>• State University Tuition Fee*</li><li>• All other Category I and II fees as defined in Executive Order No.1054 (excluding the Doctoral Program Fee and the Non-Resident Tuition unless eligible through Title 5, Section 41910).</li></ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"><li>• Associated Student Body Fee</li><li>• University Union Fee</li><li>• Health Facilities Fee</li></ul>
Unit 4 (Academic Professionals)	<ul style="list-style-type: none"><li>• Application Fee</li><li>• Health Services Fee</li><li>• Identification Card Fee (if mandatory)</li><li>• Instructionally Related Activity Fee</li><li>• State University Tuition Fee*</li><li>• Professional Program Fee</li><li>• All other Category I and II fees as defined in Executive Order No.1054 (excluding the Doctoral Program Fee and the Non-Resident Tuition unless eligible through Title 5, Section 41910).</li></ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"><li>• Associated Student Body Fee</li><li>• University Union Fee</li><li>• Health Facilities Fee</li></ul>
Unit 6 (Skilled Trades)	<ul style="list-style-type: none"><li>• Application Fee</li><li>• Health Services Fee</li><li>• Identification Card Fee (if mandatory)</li><li>• Instructionally Related Activity Fee</li><li>• State University Tuition Fee*</li></ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"><li>• Associated Student Body Fee</li><li>• University Union Fee</li><li>• Health Facilities Fee</li></ul>

Unit 8 (Public Safety)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Health Services Fee</li> <li>• Identification Card Fee</li> <li>• Instructionally Related Activity Fee</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	<ul style="list-style-type: none"> <li>• Associated Student Body Fee</li> <li>• University Union Fee</li> <li>• Health Facilities Fee</li> </ul>
C99 (Confidential) E99 (Excluded) M80 (MPP) M98 (Executive)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• CSU Doctorate Tuition Fee</li> <li>• Health Services Fee</li> <li>• Identification Card Fee</li> <li>• Instructionally Related Activity Fee</li> <li>• State University Tuition Fee*</li> </ul>	N/A	<ul style="list-style-type: none"> <li>• Associated Student Body Fee</li> <li>• University Union Fee</li> <li>• Health Facilities Fee</li> </ul>

\* This includes the State University Tuition Fee charged during state-supported summer term. State University Tuition Fees include Undergraduate, Credential and Graduate/Post Baccalaureate Tuition Fees.

\*\* Under a CSU Doctoral Program, employees pay the difference between the Doctoral Tuition Fee and the part-time Graduate Fee.

### Dependent Fees

Fees waived or reduced under the CSU Fee Waiver Program vary for dependents of represented and non-represented employee categories and are based on CBA for represented employees and Policy for non-represented employees as follows:

<b>Employee Category</b>	<b>Dependent Fees Fully Waived</b>	<b>Dependent Fees Partially Waived**</b>	<b>Dependent Fees Reduced to \$1.00</b>
Unit 1 (Physicians)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee (if mandatory)</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
Units 2, 5, 7, 9 (CSUEU)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee (if mandatory)</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
Unit 3 (Faculty)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
Unit 4 (Academic Professionals)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee (if mandatory)</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
Unit 6 (Skilled Trades)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee (if mandatory)</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
Unit 8 (Public Safety)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• Identification Card Fee</li> <li>• State University Tuition Fee*</li> </ul>	Equivalent of the Part-Time Graduate Tuition Fee for enrollment in a CSU Doctoral Program	None; all other fees paid at regular rates.
C99 (Confidential) E99 (Excluded) M80 (MPP) M98 (Executive)	<ul style="list-style-type: none"> <li>• Application Fee</li> <li>• CSU Doctorate Tuition Fee</li> <li>• Health Services Fee</li> <li>• Identification Card Fee</li> <li>• Instructionally Related Activity Fee</li> <li>• State University Tuition Fee*</li> </ul>	N/A	<ul style="list-style-type: none"> <li>• Associated Student Body Fee</li> <li>• University Union Fee</li> <li>• Health Facilities Fee</li> </ul>

**8. What is the tax implication of the CSU Employee Fee Waiver and Reduction Program?**

Generally, undergraduate fees for employees are nontaxable. Graduate/Doctorate fees for employees are nontaxable if expenses do not exceed \$5,250 (in a calendar year) pursuant to IRC 117(d) and 127.

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

*Effective with the 2019 tax year, commencing with the spring 2019 academic term, all graduate/doctorate level courses taken by employees exceeding the \$5,250 threshold will be taxable and withheld from the employee's pay warrant. Employees may consult a personal tax advisor to determine if courses taken are job related pursuant to IRC Section 132(d) and submit the deduction on their personal tax return.*

**9. What is the deadline to submit a Fee Waiver Application?**

Fee Waiver applications will not be accepted after Census Date of the applied semester. Normally, students have 14 days to pay fees after registering for courses (deadline determined by the Bursar's Office). If you do not submit your Fee Waiver application before the 14-day deadline for paying fees, you will have to pay the fees up front. You are welcomed to submit your Fee Waiver application at any point up to Census Date. Once the application is approved, a refund will be processed by the Bursar's Office.

**10. Do I have to reapply for Fee Waiver each semester?**

Yes. As also required under the old program, a Fee Waiver application must be submitted for each semester participation is requested in the program for both new and continuing participants.

**11. Who do I contact for additional information?**

Should you have additional questions, you may contact the Benefits Office at [feewaiver@csus.edu](mailto:feewaiver@csus.edu).

*If there is a discrepancy between this document and the official CSU Employee Fee Waiver and Reduction Program policies or governing policies, the official policies will always govern.*