

CAL STATE EAST BAY
Dependent Tuition Fee Waiver Application

This application is to be completed by the employee and returned to the Tuition Fee Waiver Coordinator in the Office of Human Resources.

Employee _____ PS ID: _____
Department _____ Work Phone # _____
Department ID _____ (Required) Bargaining Unit _____
E-Mail Address _____ *Bargaining Unit # _____

* FERP (Unit 3) employees are considered tenured faculty and are eligible for fee waiver only during the quarters when they are actively employed.
____ I have a FERP appointment for the requested term (please check if applicable).

I wish to transfer my tuition fee waiver eligibility, as provided in the appropriate policy or collective bargaining agreement, *to my spouse, dependent child or domestic partner.*

Dependent's Name _____ Student/Net ID # _____

Home Address : _____
Street Address _____
City _____ State _____ Zip _____

Relationship to Employee: Spouse Dependent Child* Registered Domestic Partner
*Dep. Child DOB: _____

Please refer to dependent eligibility information on reverse side of form.

Term _____ Year _____ Campus of Attendance _____ Due Date: _____

Student Status: New or Continuing and Undergraduate Graduate Ed D. Credential

NOTE: Fees waived for Graduate and Doctorial courses are taxable to employee.

I certify that the individual named above is *my legal spouse, dependent child or registered domestic partner* and that the information provided above is true. I understand this transfer prohibits my personal use of fee waiver benefits during the period indicated. Further, I understand that my spouse, dependent child or domestic partner is responsible for meeting all registration and payment deadlines.

Signature of Employee _____ Date _____

Approved Denied: _____ Email notice sent: _____

Approval – Human Resources Office _____ Date: _____

Proof of payment received and verified _____ (HR initials)

Eligibility Requirements

Employees eligible for the CSU tuition fee waiver program may transfer their existing tuition fee waiver benefit entitlement to an eligible dependent:

- **Dependent child** is defined depending on your bargaining units as (1) your child or stepchild **under 25*** who has never been married; or (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.
- **Domestic Partnership** as defined by the State of California: Same-sex domestic partnerships between persons who are both at least 18 years of age, **OR** opposite sex domestic partnerships when one or both persons are *over the age of 62* and one or both partners meet the specified eligibility criteria under the Social Security Act. **DOCUMENTATION NEEDED:** Domestic Partnerships meeting these requirements are eligible to register with the Secretary of State a Declaration of Domestic Partnership. *There are two additional forms that need to be filed with our Campus. All these forms are available in the Office of Human Resources, SA 2600.*

* UAPD (Unit 1), and SUPA (Unit 8) eligibility for dependents is under age 23

Dependent Tuition Fee Waiver Eligibility

Employee Category	
Spouse or Dependent Child under age 25* * UAPD (Unit 1), and SUPA (Unit 8) eligibility for dependents is under age 23	Units 2, 3, 4, 5, 6, 7, 9 Executive (M98) Confidential (C99) MPP (M80)
Domestic Partner (Declaration of Domestic Partnership is filed with the Secretary of State)	Units 1, 2, 3, 4, 5, 6, 7, 9 Confidential (C99) MPP (M80), Executive (M98)

Enrollment Conditions

This benefit is subject to the following conditions:

- The employee may transfer tuition fee waiver eligibility to only one dependent; therefore, employee cannot participate in the tuition fee waiver program during the dependent's participation.
- Eligible dependent must be matriculated toward a degree or teaching credential. Courses must count for credit toward a degree or credential. Normal academic standards must be maintained.
- If both parents are eligible employees, each may confer a tuition fee waiver benefit.
- Approval is for one term only and must be re-established for each additional term of enrollment. A Dependent Tuition Fee Waiver Application must be submitted for each term.
- Eligible dependent may use the dependent tuition fee waiver eligibility at another CSU campus. Enrollment in classes at other CSU campuses is subject to space availability.
- This tuition fee waiver benefit does not apply to out-of-state tuition.

Fees Waived

- The Dependent Tuition Fee Waiver benefits apply to the following fees only: *Tuition Fee; Identification Card Fee; Instructionally Related Activity Fee, Health Services Fee, and State University Fee.* The State University Tuition Fee for a dependent is waived for a maximum of two classes or six units, whichever is greater per term. Eligible dependent taking courses in addition to the fee waiver courses shall pay the difference between the part-time State University Tuition Fee and the full-time State University Tuition Fee.

Tax Issues

The Internal Revenue Code (IRC) provides three ways to make employer-paid training and educational assistance, including fee waivers and reductions, excludable from taxable income: **(1)** Qualified Tuition Reduction under Internal Revenue Code Section 117(d); **(2)** Educational Assistance Programs under Internal Revenue Code Section 127; and **(3)** Working Condition Fringe Benefits under Internal Revenue Code Section 132(d).

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

<u>Eligible Participant</u>	<u>Course Level(s)</u>	<u>Tax Status</u>
CSU Employee	Undergraduate Graduate *	Nontaxable Taxable over \$5,250
Employee's Spouse/Dependent Child	Undergraduate Graduate	Nontaxable Taxable
Employee's Domestic Partner	Undergraduate Graduate	Taxable Taxable

* Effective January 1, 2019