



Department of Human Resources Guide to Applying for Tuition Remission

The Tuition Remission program continues the University's tradition of encouraging and supporting the educational development of its employees, spouses or registered domestic partners, dependent children, and dependent children of registered domestic partners.

EMPLOYEE BENEFIT

What's inside?

- Eligibility Requirements
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 - Eligible Programs
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 - A step-by-step guide through
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The USD Department of Human Resources is proud to extend the Tuition Remission benefit to regular full-time benefit based employees and their eligible dependents.

The University is committed to academic excellence, Catholic intellectual and social traditions, and providing top-notch education. This guide provides assistance to all applicants interested in applying for the benefit. Please read through this guide carefully before you apply for the Tuition Remission benefit. We hope you find this guide helpful and we look forward to assisting you as you take advantage of this benefit for the next academic year.



HELPFUL HINTS

- ♦ If your Tuition Remission benefit will be taxable income to you, you may want to contact the payroll office to determine your tax liability.
- ♦ The deadline to file for tuition remission benefits is February 28 of each calendar year for the following academic year.

Need more information?

Please visit <https://www.sandiego.edu/hr/benefits/education-benefits.php>

or

email the Benefits team at
usdbenefits@sandiego.edu

WHAT IS TUITION REMISSION?

Tuition Remission is a benefit that waives 100% of tuition for eligible USD programs taken by full-time, benefit-based regular employees, their spouses or registered domestic partners, and their dependent children.

Eligible individuals may use the benefit for one undergraduate or one graduate degree. Eligibility for the Tuition Remission program does not guarantee admission to USD. All students must meet the USD admissions requirements in order to be admitted to any undergraduate or graduate programs.

(Refer to the Policy and Procedure manual, Section 3.11.2 for complete program details)



DATE OF ELIGIBILITY

Eligibility for employees begins the first day of the fall or spring semester which is nearest to their first year anniversary date.

Eligibility for spouses or registered domestic partners, dependent children and dependent children of domestic partners begins the first day of the fall or spring semester which is nearest to the employee's second year anniversary date.

WHO IS ELIGIBLE?

EMPLOYEES in a full-time, regular benefit-based continuing position are eligible after one year of service .

An employee's **SPOUSE** or registered **DOMESTIC PARTNER** is eligible to begin classes the first day of the fall or spring semester nearest to the employee's second year anniversary date.

An employee's **DEPENDENT CHILDREN** & **CHILDREN OF DOMESTIC PARTNERS** under age 25 are eligible to begin classes the first day of the fall or spring semester nearest to the employee's second year anniversary date.

DEPENDENT CHILDREN OF RETIREES who had at least 15 years of service in a full-time regular benefit-based continuing position and retired from USD at age 65 or older are eligible for Tuition Remission courses leading to an undergraduate degree.

ROTC INSTRUCTORS are eligible upon employment.

Tuition Remission Policy: 3.11.2 - Excerpt

The Tuition Remission benefit is not a contract between the University of San Diego and its employees or retired employees. The University reserves the right to reduce or terminate Tuition Remission at any time, and such changes or elimination of this benefit may affect those who have previously received this benefit. No employee or former employee shall have any vested right to benefits. In addition, the annual cost of the Tuition Remission policy may not exceed 1% of the university's operating budget. The university reserves the right to deny Tuition Remission to an otherwise eligible employee if the amount spent in implementing the Tuition Remission policy exceeds 1% of the university's operating budget. Courses taken on a space-available basis are not counted in computing the 1% limit.

In years where the cost will exceed the 1% limit, those who applied by the deadline will be given priority in the following order: 1) continuing students who are already using the benefit; 2) new students who are dependent children of employees; 3) new students who are employees; and 4) new students who are spouses or registered domestic partners of employees. If it is necessary to prioritize within a category, this will be done based upon years of service of the employee. Beyond that, Tuition Remission will be granted where there is space available in the program for that academic year.

Self-supporting programs such as Graduate Career Programs, Continuing Education and Summer Camps are not covered by Tuition Remission. Study abroad courses for academic credit are covered by Tuition Remission if USD is the credit-granting institution, USD is directly administering the program, and USD retains all tuition generated by the program. Tuition Remission may be used for select study abroad programs. A current list of programs excluded from Tuition Remission is posted on the benefits website at <http://www.sandiego.edu/hr/benefits-compensation/education-benefits.php>

Note: For information on specific study abroad programs covered by Tuition Remission, please see the study abroad website at <https://www.sandiego.edu/international/study-abroad/policies/#accordion-panel9>

Tuition Remission is not a guaranteed benefit. Eligibility for the Tuition Remission program does not guarantee admission to USD. All students must meet the USD admissions requirements in order to be admitted to any undergraduate or graduate programs.

CONDITIONS:

- ◆ The use of the benefit must not interfere with the employee's job responsibilities and employees are limited to 18 units per academic year.
- ◆ The benefit is for tuition only. Application fees, student body fees, parking fees and any other fees assessed to all students are the responsibility of the employee, spouse, registered domestic partner, dependent child, or dependent child of a registered domestic partner. Employees are not assessed the student body fee.
- ◆ Tuition Remission for Interession and Summer Session is on a space-available basis.



2021-22

ELIGIBLE PROGRAMS

INELIGIBLE PROGRAMS

Bachelor Degree Programs	
Master's Degree Programs in School of Business (except MSEL and IMBA Dual Degree)	Continuing Education courses/programs* (including Open Campus courses—Non-USD Students eligible for Tuition Remission must apply for Special Student status through UG Admissions)
Master's Degree Programs in CAS (except MFA)	Summer Camps
SOLES Global Study (USD programs only) MA programs MEd programs (Except Online MEd) Ph.D in Leadership Studies Teaching credential Pdd or EdS in Education for Social Justice	School of Business Master of Science in Executive Leadership (MSEL)* Dual Degree Programs MBA/JD, etc— TR covers cost of ONE degree only IMBA Dual Degree while at Partnership Institutions (Not a USD program for tuition purposes)
Master's Degree Programs in KSPS (except MA Social Innovation and MS Conflict Management & Resolution)	KSPS MA Social Innovation and MS Conflict Management & Resolution
Law School Programs	Test Preparation Programs
Law Foreign Programs	Paralegal Programs
SON Programs (except Online MSHCI)	Online Master of Science in Health Care Informatics (SON)
Undergraduate Dual Degree programs, and USD exchange programs with partner institutions including USD Madrid program	Online Master's Degree (MEd)
USD Faculty led Study Abroad Program (tuition only)	Online Master of Science in Law Enforcement and Public Safety Leadership (MS-LEPSL)
Affiliated Study Abroad Programs May be partially eligible; see Study Abroad Office (student must pay program fee to Partner Institution)	Master of Science in Cyber Security Operations & Leadership (PCE)
Master of Science in Cyber Security Engineering (SOE)	Franciscan School of Theology courses/programs may be partially eligible (student must pay program fee to FST)

THE APPLICATION PROCESS

Employees must follow all procedures and meet all required deadlines to receive the Tuition Remission benefit. The deadline to apply for Tuition Remission benefits is February 28 of each calendar year for the next academic year. Employees or eligible family members using the Tuition Remission benefit must meet all applicable terms and conditions for enrollment, such as entrance requirements, admission procedures and deadlines, good academic standing, and payment of application fees. They must also follow established registration procedures.

HOW TO APPLY USING THE TUITION REMISSION E-FORM:

Go to <https://usd.tfaforms.net/218880> and log in using your USDOne Credentials

You will be directed to the Tuition Remission e-form

The screenshot shows the 'Tuition Remission Application' form. At the top, it says 'Contact USD Benefits at usdbenefits@sandiego.edu if you have any questions about the completion and submission of this form.' Below this is a 'Please note:' section with two bullet points: 'Employees receiving Tuition Remission are limited to taking 18 units per academic year (or 22 units per academic year for law students). This limit does not apply to eligible dependents receiving Tuition Remission.' and 'In order to verify your dependent's eligibility, they must be listed as a dependent on your employee record in Oracle before you submit this form.' The 'Employee Information' section has two input fields: 'Employee Full Name: *' with the value 'Diego Torero' and 'Employee USD ID: *' with the value '00999999'.

Select the academic year you're applying for from the drop down menu and indicate whether you're applying for yourself, eligible dependents (spouse, registered domestic partner, children, or children of a registered domestic partner), or both yourself and an eligible dependent.

The screenshot shows the 'Application Details' section of the form. It includes a 'Please note:' section stating: 'If you are applying for multiple dependents, you will need to submit a separate Tuition Remission application for each dependent. You can submit a Tuition Remission application that includes yourself and one additional dependent on the same form.' Below this are two sections: 'Academic Year Applying For *' with a dropdown menu showing '2021-2022' and 'I am applying for: *' with three radio button options: 'Myself' (selected), 'Dependent(s)', and 'Both'.

Important notes:

- If you are applying for multiple dependents, you must complete a separate e-form for EACH dependent. You can apply for yourself and ONE eligible dependent on the same application.
- In order to verify your dependent's eligibility for Tuition Remission, they *must* be listed in Oracle. If you need to add your dependent, please log into Oracle Self-Service at <https://oracleapps.sandiego.edu> using your USDOne credentials and go to Personal Information/Dependents & Beneficiaries to add them. Since you cannot add a dependent's Social Security Number or Date of Birth in Oracle Self-Service, please contact usdbenefits@sandiego.edu for assistance with getting this information to the Benefits team.

If applying for yourself: Enter the number of units you will take for each term in the year (if you're not sure, please estimate the number of units) and choose the appropriate program from the menu.

academic
degree pro-

My Information 2021-2022

Intended Enrollment Units by Semester

Reminder: Employees receiving Tuition Remission are limited to taking 18 units per academic year (or 22 units per academic year for law students). This limit does not apply to eligible dependents receiving Tuition Remission.

Fall	Interession	Spring	Summer
<input type="text" value="6"/>	<input type="text" value="4"/>	<input type="text" value="6"/>	<input type="text"/>

Program *

- Arts and Sciences - Master's Degree (excludes MFA)
- Bachelor's Degree**
- KSPS - Master's Degree (excludes MA
- Soc Innov and MS Conf Mgmt Res)
- Law School JD

you'll apply for, select the one you're most
program at a later time if your plans change.

Answer "Yes" or "No" to the required questions:

Program

Study Abroad?

☐ Yes

☒ No

Currently receiving tuition remission? *

☐ Yes

☐ No

Received tuition remission for a previous USD degree? *

☐ Yes

☐ No

Completed an Undergraduate Degree? *

☐ Yes

☐ No

If applying for a dependent: You will need to enter their information in the e-form and indicate if they have a USD ID (Banner) Number. If they do not have a USD ID, please enter the e-mail address they used/ will be using to apply for admission to USD. Enter the number of units per term and degree program for the dependent.

First Name *	Last Name *		
<input type="text" value="Future"/>	<input type="text" value="Torero"/>		
Dependent Date of Birth *			
<input type="text" value="01/01/2000"/>			
Does your dependent have a USD ID Number (9 digit Banner ID)? *			
<input type="text" value="No"/>			
Please enter the email address your dependent will use when applying to USD *			
<input type="text" value="gotoreros@email.com"/>			
Intended Enrollment Units by Semester			
Fall	Intersession	Spring	Summer
<input type="text" value="12"/>	<input type="text" value="4"/>	<input type="text" value="12"/>	<input type="text"/>
Program			
<input type="text" value="Bachelor's Degree"/>			

Answer “Yes” or “No” to the required questions:

Please note: If you're unsure which program your dependent will apply for, select the one they are most interested in at this time. You can update their program at a later time if their plans change.

Study Abroad? *

☐ Yes

☒ No

Currently receiving tuition remission? *

☐ Yes

☐ No

Received tuition remission for a previous USD degree? *

☐ Yes

☐ No

Completed an Undergraduate Degree? *

☐ Yes

☐ No

If you're applying for a child, there will be additional questions to answer regarding tax dependent status. **If your child is not a tax dependent, please contact usdbenefits@sandiego.edu**

If you answer no to any of the IRS dependent questions below, please contact usdbenefits@sandiego.edu.

Is child IRS dependent current tax year? *

☒ Yes
☐ No

Is child IRS dependent last tax year? *

☐ Yes
☐ No

Is child IRS dependent tax year before last? *

☐ Yes
☐ No

Once you have completed the application, you will sign and date your Tuition Remission e-form and click "Submit."

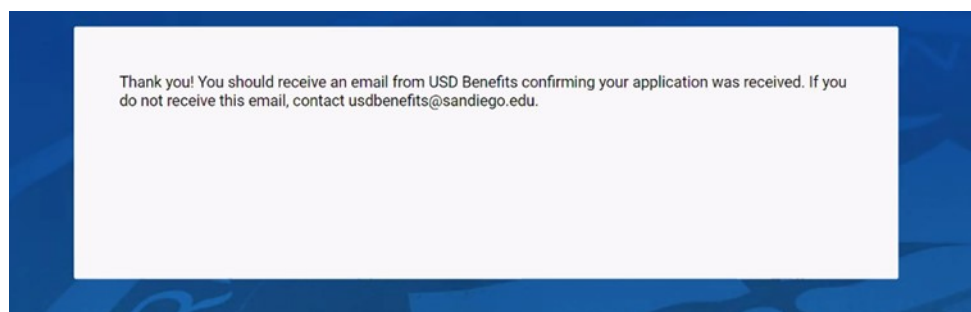
Submission Agreement

Electronic Signature * Date *

More Information

[Tuition Remission Guide](#)
[List of eligible programs](#)

You will receive a submission confirmation:



You will also receive an email from the USD Benefits team confirming your application was received. If you submitted multiple applications, you will receive a confirmation email for each application you submitted:



Hello Diego Torero,

This is to confirm your 2021-2022 Tuition Remission application has been received for Diego Torero.

Fall Units (if applicable): 6

Intercession Units (if applicable): 4

Spring Units (if applicable): 6

Summer Units (if applicable):

For undergraduate tuition remission applications, an additional financial assistance form is required. If you have not already, please fill out this form for 2021-2022: <https://usd.tfaforms.net/218959>. This form only needs to be filled out once/year per employee.

Once your application has been reviewed, you will receive a follow up notification regarding you and/or your dependent(s) eligibility for Tuition Remission.

Please feel free to reach out to usdbenefits@sandiego.edu with any questions.

Thank you,

USD Benefits Team

After your application is received, the USD Benefits team will review it to confirm you meet the eligibility requirements to apply for Tuition Remission. Once your application is reviewed, you will receive a follow up email from USD Benefits indicating whether you are eligible/ineligible to apply for Tuition Remission:



Hello Diego Torero,

We have reviewed your 2021-2022 Tuition Remission application for Future Torero. This is to notify you that Future Torero is eligible for Tuition Remission for the below terms and units.

Fall: 12 units

Intercession: 4 units

Spring: 12 units

Please be advised that this email does not guarantee approval for the Tuition Remission benefit. The Tuition Remission policy number 3.11.2 states that "The annual cost of the Tuition Remission Policy may not exceed 1% of the University's operating budget."

Once all Tuition Remission applications have been reviewed and the operating budget has been determined, we will notify you (typically in late April) if you and/or your eligible dependents have been approved to use Tuition Remission.

Please feel free to reach out to usdbenefits@sandiego.edu with any questions.

Thank you,

USD Benefits team

Important note: If you receive an email that you're eligible for the Tuition Remission benefit, **it does NOT guarantee you will be approved for the benefit.** Once all applications have been reviewed and the operating budget has been determined, USD Benefits will notify employees via email (typically in late April) if they have been approved to use the Tuition Remission benefit.

FINANCIAL AID

Eligibility for USD Tuition Remission for full-time students must be coordinated with any state, federal, or merit based financial aid. Failure to meet financial aid deadlines may result in the lack of eligibility for Tuition Remission for that year.

A Financial Aid Questionnaire must be completed for those students enrolled in undergraduate programs only. Eligibility for financial aid must be determined before a student is granted the Tuition Remission benefit. The Financial Aid Questionnaire is available online [here](#).

The following chart gives a general indication of the relationship between size of family and total family income considered in determining a student's eligibility for need-based aid. In addition, families with unusual circumstances, a significant number of family members in college, unusually low assets, etc. may qualify for need-based funds as well.

If the **family income is below** and the **number of family members** is . . .
(2021-2022)

Family size:	Income
Six or more	\$127,700
Five	\$118,400
Four	\$110,400
Three	\$101,700
Two	\$99,200

then the student may be eligible for need- based financial aid.

Family income refers to total income, both taxable and non-taxable.*

*Figures are subject to change

If the employee's family size and income falls within the income levels on the above chart, the student must file for financial aid by completing the FAFSA form. The student's request for Tuition Remission will be reviewed after the student's financial eligibility has been determined. If the student qualifies for financial aid (including the Cal Grant), his/her financial aid will be coordinated with Tuition Remission benefits. **Failure to file a FAFSA form when required may result in a loss of eligibility.**



You can complete the Financial Aid Questionnaire online [here](#). Please note that the Benefits team cannot determine your eligibility for the Tuition Remission benefit until you complete the questionnaire.

Follow the prompts to complete the questionnaire, sign, and submit the form.

Tuition Remission Financial Aid Questionnaire

Contact USD Benefits at usdbenefits@sandiego.edu if you have any questions about the completion and submission of this form.

Identity Information

Full Name: *

Diego Torero

USD ID: *

009999999

Application Details

Please select the appropriate Academic Year you're applying for in order to access the Tuition Remission Financial Aid Questionnaire.

Academic Year Applying For *

Please select...

Please select...

2020-2021

2021-2022

Tuition Remission Financial Aid Questionnaire

Academic Year 2021-22

**Financial Aid Eligibility
For Undergraduate Students Only**

Possible eligibility for financial aid must be determined before a full-time student is granted Tuition Remission benefits.

Refer to the chart below before answering the following question:

Does the employee's family size and income fall within the levels on the chart below? *

☒ Yes☐ No

1. If yes, the student must apply for financial aid by completing the Free Application for Federal Student Aid (FAFSA) online at www.fafsa.gov. If the student qualifies for financial aid (including a Cal Grant), the student's financial aid will be coordinated with Tuition Remission benefits.

2. If no, the student is not required to file a Free Application for Federal Student Aid (FAFSA), but may still choose to apply for financial aid by completing the Free Application for Federal Student Aid (FAFSA).

The following chart gives a general indication of the relationship between size of family and total family income considered in determining a student's eligibility for need-based aid. In addition, families with unusual circumstances, a significant number of family members in college, unusually low assets, etc. may qualify for need-based funds as well.

*If the **family income is below** and the **number of family members is.....**
(2021-22)*

<u>Family Size:</u>	<u>Income</u>
2	\$99,200
3	\$101,700
4	\$110,400
5	\$118,400
6 or more	\$127,700

then the student may be eligible for need-based financial aid.

Family income refers to total income, both taxable and non-taxable.

If the employee's family size and income falls within the income levels on the above chart, the student must file for financial aid before March 2, 2021. If not, the student is not required to file a 2021-2022 FAFSA but may choose to do so.

Note: The total amount of Cal Grant, USD Tuition Remission and USD merit scholarship cannot exceed USD tuition.

Submission Agreement

Electronic Signature *

Diego Torero

Date *

12/23/2020

More Information

[Tuition Remission Guide](#)

[List of eligible programs](#)

Submit

TAXATION

The taxation of this benefit is determined by the Internal Revenue Service Code. You are responsible for the amount of tuition that is subject to Federal and State income tax, Social Security tax, and California Disability Insurance tax.

EMPLOYEES: The tuition for courses taken for an undergraduate degree is not taxable income unless the employee has previously earned an undergraduate degree at USD or any other four year college or university. Tuition for graduate level courses or a second undergraduate degree is taxed after the tuition exceeds \$5,250 in value. Any amount over \$5,250 is imputed income to the employee.

DEPENDENTS: The tuition for dependents who do not meet the eligibility requirement under IRS regulations and/or tuition for all graduate courses is reported as imputed income to the employee.

NROTC: NROTC instructors will receive a 1099 at the end of the tax year for tax purposes.

Reminder...

USD employees may only take a total of 18 units per academic year, including Summer and Intersession, or 22 units for students in the School of Law. If you want to request additional units, you must submit an appeal to the Department of Human Resources prior to the beginning of the academic year and must remain within the approved number of units. Any changes in the desired number of units to these exceptions will require additional approval.

The units indicated on the Tuition Remission application must match the number of units for which the student registers. If the number of units changes, you must complete a Change of Status e-form located on the One Stop forms website at <https://www.sandiego.edu/one-stop/forms/financial-aid.php#content-accordion6> and notify usdbenefits@sandiego.edu.

One Stop Student Center

Located in UC 126, the One Stop Student Center welcomes all students who need assistance with registration, student accounts or financial aid. You may submit questions via email at onestop@sandiego.edu or call (619) 260-2700. Business hours are Monday, Tuesday and Friday, 9am-5pm; Wednesday 9am-6pm; and Thursday 10am-5pm.

Office of Financial Aid
(619) 260-2700 or (800) 248-4873
usdofas@sandiego.edu



Important!

The annual cost of the Tuition Remission Policy may not exceed 1% of the University's total operating budget. The University reserves the right to deny tuition remission to an otherwise eligible employee if the amount spent in implementing the Tuition Remission Policy exceeds 1% of the University's operating budget. Courses taken on a space-available basis during Intersession and Summer sessions are not counted in computing the 1% limit.