

The background features a large, light gray watermark of the Stanford University seal. The seal is circular and contains the text "LELAND STANFORD JUNIOR UNIVERSITY" around the top edge and "1891" at the bottom. In the center of the seal is a redwood tree on a hill, with the German motto "DIE LUFT DER FREIHEIT WEHT" (The wind of freedom blows) written in a circular path around the tree.

# Staff Tuition Reimbursement Program

SPRING INFORMATION SESSION

Tuition & Training Programs  
University Human Resources

March 11, 2015

# Coming Soon\* - Exciting News for STRP and You Beginning April 30, 2015!

## ONLINE APPLICATION SUBMISSION @ "MY LEARNING CENTER"

- Select: Direct Bill
  - › Four-step application process for pre-payment directly to your school
- Select: Expense Reimbursement
  - › Upload documentation and receipts

## EDUCATION NETWORK

- Tuition and book discounts at many accredited colleges and universities

## EDUCATION ADVISING - AT NO COST TO ANY STANFORD EMPLOYEE

- Make an appointment with an Academic Advisor to receive expert advice and support to help you choose the best path for your educational and career goals

## EDUCATION FINANCIAL ADVISING

- Sometimes STRP is not enough
- Financial advisors to help you prepare financially for your education.

Throughout this presentation you will see "\*". That means that information is effective on or after April 30, 2015.

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# Program Overview

STANFORD

UNIVERSITY HUMAN RESOURCES



## Staff Tuition Reimbursement Program Guidelines

A Stanford University Tuition & Training Program

# STRP Description

## PURPOSE OF THE PROGRAM

- Supports employee development by providing partial or full payment of tuition and covered expenses for courses meeting requirements of undergraduate or graduate degree programs.
- The degree program does not need to be work-related.
- Provide tax-exempt payments directly to accredited colleges and universities toward the cost tuition.

## MAXIMUM BENEFIT IS THE LESSER OF

- The cost of tuition and covered fees, less any applicable grants or scholarships.
- Up to \$5,250 each fiscal year (9/1 - 8/31)
- The benefit payable will be calculated each semester, quarter, or each time you apply for benefits and seek an authorization letter.
  - › With new process, you must submit an application each term.

# Eligibility

EMPLOYEE  
INSTITUTION



# Eligibility—Employees

## STAFF

- Regular or fixed-term staff member (including academic staff) in a benefits-eligible University position and 50% Full Time Equivalent (FTE) or greater.
- Have completed one year in a benefits-eligible, ongoing, regular or fixed-term position.
- Be enrolled in a degree program at an eligible institution.
- Faculty, students, temporary workers are not eligible

## Eligibility—Institutions\*

### ACCREDITED U.S. INSTITUTIONS ONLY

- Eligible institutions must offer undergraduate and/or graduate degree programs (Associate, Bachelor, or Doctoral degree).
- Certification programs are not covered.

TO QUALIFY FOR THE TUITION ASSISTANCE AND ADVISING PROGRAM, SCHOOLS HAVE TO BE ACCREDITED BY ONE OF THE FOLLOWING **US REGIONAL ACCREDITING ORGANIZATIONS**

*(Stanford will grandfather other accreditations if participant is currently enrolled)*

- Middle States Association of Colleges and Schools
- New England Association of Schools and Colleges
- North Central Association of Colleges and Schools
- Northwest Commission on Colleges and Universities
- Southern Association of Colleges and Schools
- Western Association of Schools and Colleges



# Things Can Change . . .

## IMMEDIATELY ADVISE THE STRP OFFICE IF

- You withdraw from college during an academic year
- You transfer to another college
- You are no longer eligible
- Your employment status changes during the period covered by the approved application

# How and When To Apply

## APPLICATION CYCLE



# Application Process\*

## CURRENT PROCESS

- Print and complete application
- Submit to STRP office
- STRP Office will
  - › Check eligibility
  - › Approve application
  - › Send “Letter of Authorization”
- Employee
  - › Give Letter of Authorization to school
  - › Enroll in courses

## \*NEW PROCESS BEGINS APRIL 30<sup>TH</sup>

- On STRP website use SUNet ID to enter “My Learning Center”
- Select “Add Application” and follow four-step application submission process.
  - › You must apply no later than 30 days after course start date or benefit will be denied.
- EdAssist will
  - › Confirm receipt of application via email
  - › Check eligibility
  - › Notify you of approval
  - › Send “Letter of Credit” (LOC)
- Employee
  - › Give LOC to school (**IMPORTANT!**)

## New\* – Two STRP Benefit Types

### DIRECT BILL

- You submit an application for pre-payment of tuition and covered fees.
- If approved, you receive Letter of Credit (LOC) to take to your school. This LOC works like a voucher and will be accepted as payment by your school.
- School invoices STRP Administrator (EdAssist)
- Payment is made directly to institution by EdAssist.

### EXPENSE REIMBURSEMENT

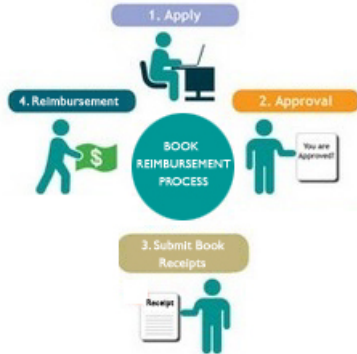
- You paid tuition and need to be reimbursed, or
- You paid for covered expenses and need to be reimbursed for
  - › Required Books & Software
  - › Course Materials & Supplies
  - › Equipment & Supplies
- To submit your official grade record

# New Application Process

## COURSE / FEE PRE-PAYMENT



## BOOK REIMBURSEMENT



## DIRECT BILL

- Apply online at “My Learning Center” on STRP website
- When approved take Letter of Credit (LOC) to your school
- School will invoice STRP

## EXPENSE REIMBURSEMENT

- Apply online at “My Learning Center” on STRP website
- Upload receipts and requested documentation
- Receive reimbursement

# Obtain Prior Approval of Time Away From Work for Academic Pursuits

## POLICY – ADMINISTRATIVE GUIDE 2.1.12

- Approval of any time off from work to attend degree coursework is at the department's discretion and must be compatible with the work schedule of the department and consistent with requirements of contracts and grants regarding time worked.
- According to the Administrative Guide Memo 2.1.12, a staff member may be granted a maximum of twenty- four (24) hours per month of release time, without pay, for an approved undergraduate or graduate course, if no comparable course is offered during non-work hours. Time off for part-time eligible staff should be pro- rated based on the percent time worked.

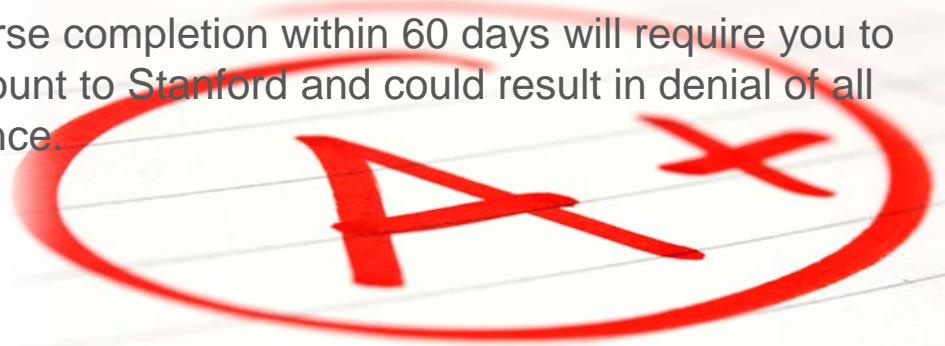
## PROCESS

- Download and complete Supervisor Approval Form (available after April 17<sup>th</sup>)
- Obtain supervisor signature
- Submit to STRP Office no later than five business days from application submission

# Proof of Satisfactory Completion

SUBMIT EVIDENCE OF COURSE COMPLETION – WITHIN **60 DAYS** OF THE COURSE END DATE

- You will need to log in to the STRP *My Learning Center* to submit your proof of successful course completion.
- An official grade report or transcript showing that you met the minimum grade requirement will be required as proof of successful completion.
- Failure to submit evidence of course completion within 60 days will require you to repay the tuition/fee/expense amount to Stanford and could result in denial of all future requests for tuition assistance.



# Proof of Satisfactory Completion

REIMBURSEMENT FOR CLASSES IS GRADE-DEPENDENT. IN CLASSES IN WHICH LETTER OR NUMBER GRADES ARE AVAILABLE, EMPLOYEES WILL TAKE IT FOR A GRADE.

Degree	Minimum Acceptable Grade	Not Acceptable
Undergraduate	C	C-
Graduate	B	B-
PhD, MBA	B	B-
Pass/Fail Class	Pass	Fail



# When Repayment is Required

YOU ARE REQUIRED TO REPAY TUITION THAT WAS PAID BY STRP TO AN INSTITUTION ON YOUR BEHALF IF:

- Withdrawal from course after payment has been made
- Failure to submit grades
- Non-satisfactory completion
  - › Below minimum grade requirement

## Benefit Payment

ANNUAL BENEFIT AMOUNT  
FINANCIAL AID  
HOW FTE AFFECTS BENEFIT  
COVERED FEES & EXPENSES



# Benefit Overview

- Maximum amount allowable in a calendar year by Federal statute is \$5,250
- This amount is non-taxable
- STRP will pay some or all of the **actual tuition** and covered fees and expenses
- Financial aid amounts will be removed from the actual tuition amount before applying it to the reimbursement calculation:

Tuition + Fees - Financial Aid = Actual Tuition Cost for Payment Calculation



# STRP Annual Benefit Examples

## YOUR STANDARD HOURS (FTE) AFFECTS PAYMENT AMOUNT

The maximum annual amount payable is based on how many hours per week you work

Employee's FTE	Maximum Annual Benefit	1st Semester Benefit Payment	Balance Remaining	2 <sup>nd</sup> Semester Benefit Payment	Balance at Year End
100% FTE	\$5,250.00	\$1,500	\$3,750.00	\$1,500.00	\$2,250
85% FTE	\$4,462.50	\$ 2,200	\$2,262.50	\$2,200	\$62.50
75% FTE	\$3,937.50	\$3,500	\$437.50	\$437.50	\$0
50% FTE	\$2,625.50	\$2,000	\$625.00	\$625.00	\$0

# Covered Fees and Expenses

COVERED FEES INCLUDE ONLY THE FOLLOWING, IF REQUIRED:

- Registration Fee
- Lab Fees (new)
- Technology Fees
- Required Books & Software
- Course Fees
- eLearning Fees
- Course Materials & Supplies
- Equipment & Supplies



Educational expenses does not cover:

Tools or supplies which employee may keep after the course is completed; education involving sports, games, hobbies (unless job-related), meals, lodging, or transportation.

*IRC §127(c)(1)T*

Contact EdAssist Customer Support at 844-239-8770 if you have questions about what is allowable (after April 30<sup>th</sup>).

## Additional Factors

TAXABILITY  
FINANCIAL AID



# Taxability Issues

## NON TAXABLE BENEFIT

- Up to \$5,250 of STRP or departmental assistance can be *excluded from an employee's gross income* each year.
- If more than \$5,250 is paid in on calendar year, the benefit is taxable and will be included in you W-2 earnings.



# Financial Assistance



## FINANCIAL ASSISTANCE INCLUDES

- Scholarships, fellowships, grants, tuition waivers, or gifts
- Any other form of public or private financial assistance that reduces your financial obligation in connection with your education
- A student loan is not considered financial assistance.

## FOR STANFORD UNIVERSITY STUDENTS

- STRP Office notifies the Financial Aid Office that you are in the program
- Your account will then receive credit for STRP benefit at the beginning of every term/quarter.



## More Information

STRP SYSTEM  
RESOURCES



# Change is Coming!

## WHAT?

- Submit applications online through EdAssist – a national tuition administration company
- Receive confirmation and follow application and payment status on **My Learning Center** portal
- And – more

## WHEN?

- April 30, 2015



## EDASSIST WEBINAR AND SYSTEM DEMO

- Webinar – Date and time to be announced soon.
- Webinar will be posted to STRP website.

# For More Information

## STRP WEBSITE

- [STRP Website](#)
- [Staff Tuition Reimbursement Program Guidelines](#)

## ADMINISTRATIVE GUIDE

- [Section 2.1.12 Staff Development](#)

## STRP OFFICE

- Administrator: Judy Ray
- Phone: (650) 723-0657
- Stanford Service Team - Call: (650) 736-2985 (local) or (877) 905-2985 (toll-free) – Option 5
- Email: stanford-strp@stanford.edu