



Tuition Benefits Open Forum

Wednesday, March 21, 2018

Connan Room, CUC

12:30-1:30pm

1. Opening remarks – Tim Leonard, Chair, Staff Council

- Event is the result of feedback Staff Council has received from constituents asking for greater clarity regarding tuition benefits for staff
- CMUWorks Service Center, Undergraduate Admissions and Enrollment Services representatives will present, and there will be time for Q&A
- After presentation, people can speak to representatives of Tepper programs, Heinz programs, and the Masters of Professional Writing program
- Special thank you to Kim Sestili and Terri Mohler, co-chairs of the Benefits Committee, for organizing this event

2. Human Resources presentation - Joyce Heckman, AVP & Deputy Chief Human Resources Officer

- Speaking in place of Michelle Piekutowski, AVP & Chief Human Resources Officer
- Expressed HR's dedication to partnering with Staff Council
- Presentation will address what the benefit is and how staff can apply for it
- **Tuition Benefits - Becky McGhee, Senior Benefits Administrator**
 - **For staff members**
 - Courses taken at CMU – 100% tuition remission
 - Courses taken outside of CMU – 50% tuition remission
 - When speaking of “tuition remission”, this is strictly for tuition and excludes any fees, book expenses, etc.
 - Benefit available to full-time and part-time staff with at least 6 months of employment
 - Two course limit for full-time staff members
 - One course limit for part-time staff members (CMU courses only)
 - Taxation tends to draw the most questions
 - Universities are required to tax graduate level tuition as income
 - Graduate tuition benefits over \$5,250 per calendar year are subject to federal withholding
 - **For dependent children**
 - Attending CMU – 100% tuition remission (\$52,732 per year); unlimited number of eligible children
 - Attending another institution – up to \$6,820 tuition assistance; up to two children per family
 - Both employee and dependent need to be eligible for this benefit
 - Benefits-eligible staff members must have completed 5 years of service as of October 1 (fall term), February 1 (winter/spring term) and July 1 (summer term)
 - Dependent must be enrolled in undergraduate program before age 30

- Only naturally born or legally adopted dependents meet the eligibility criteria
 - If attending another institution, dependents must be enrolled full time
 - Benefit not subject to federal, state, or local taxes if attending CMU but subject to state and local taxes if attending another institution
 - FAQ – see presentation slide deck
- **Application Process - Barb Baker, Global HCM Advisor**
 - **The process**
 - Complete supervisor form in Workday (supervisor form can be found by logging into Workday, click on Benefits, click on Apply for Tuition Benefits, click on New Employee Request)
 - Finalize course schedule
 - Submit tuition application in Workday
 - Application status types (The processing status of pending tuition applications can be viewed when you click on Apply for Tuition Benefits)
 - Saved: not ready for processing, incomplete
 - Submitted: ready for processing
 - Awaiting documentation: documentation missing/incomplete
 - Awaiting course registration: not yet enrolled in CMU courses
 - Approved – audit required: awaiting final approval
 - Processed: approved, information sent to payroll
 - **Federal taxation guidelines**
 - Federal tax rate has changed from 25% to 22% for 2018
 - Undergraduate programs – not taxable per federal law
 - Graduate programs – taxable per federal law
 - Any questions concerning the tuition benefit's effect on your tax return should be directed to a tax professional
 - **Tuition application processing begins**
 - Fall semester – July 15
 - Spring semester – January 15 (CMU applicants), first working day in January or December 15 (outside schools)
 - Summer semester – May 1

3. Undergraduate Admission presentation – Erin Latimer, Director, Office of Admission

- Works with first year full-time freshmen and full-time transfer students
- Application plans
 - early decision - 1 program only, binding agreement
 - early admission - for high school students graduating early by exhausting their high school curriculum
 - regular decision – able to apply to up to 3 colleges, non-binding agreement
 - priority is placed most highly on a student's first preference, it's becoming less common to evaluate 2nd and 3rd choices
- Steady growth in applications over the past decade with 24,353 applications for 2018
 - Last year although applicant numbers were down, yield was up 4% which is almost unheard of
 - This year 4000 more applicants applied and quality is up, translating to more conservative admission decisions
- Trends
 - STEM disciplines are becoming more popular, applicants are coming in with college level/AP courses within Physics, BC Calculus, multivariable calculus

- Formal interviews are no longer being conducted as part of the application process; in their place counseling sessions are being offered for candidates to ask questions but they will no longer be evaluative
- Alumni volunteers will no longer conduct interviews for the office, and will in place assist with yielding admitted students
- Supplemental materials- portfolios (outside of the fine arts), resumes, maker portfolios, etc. will no longer be used in the admission decision process. The application (Common Application) is being revamped to provide all students with the opportunity to tell admission their story.

4. Non-Degree Process presentation - Terri Mohler, Associate Director of Career Services, Heinz College in place of Amy Yearwood, Associate Director, Enrollment Services

- Non-degree petition must be submitted at least 2 weeks prior to start of the semester
- If a course has prerequisites, approval from the instructor is required
- All Academic Calendar deadlines apply for audited or pass/fail classes
- All Academic Calendar deadlines for adding/dropping/withdrawing apply
- Transcripts are available via SIO or The HUB
- FAQ – see presentation slide deck
- Note from Amy Seymour (Heinz College) – the non-degree course application process does not apply to the Heinz College; if one wants to take non-degree classes there, they need to go through the Heinz applications process.

5. Q&A Session

- Q.** With the changes you are proposing to the undergraduate application, are you still accepting the common application?
- A.** Yes. The common application is the only form.
- Q.** I want to audit an undergraduate class; can I do so before I've been here for 6 months?
- A.** No, you have to meet the 6 month employment requirement.
- Q.** I have stepchildren and they aren't covered by the tuition benefit. They are my dependents, I pay for their benefits. Why isn't the benefit extended to them and are there efforts in that area?
- A.** Michelle (HR) has committed to working with Tim (Staff Council) to listen to concerns staff have and determine whether we can pursue changes.
- Q.** What are the formal steps that can be taken so that feedback would be incorporated into the Benefits Committee recommendations to HR?
- A.** We are happy to take questions and feedback on this subject and others. You can find our contact information on the staff council website. You are welcome to join our committee even if you are not a staff council member.
- Q.** I am staff and have taken multiple classes, both undergraduate and graduate. Are undergraduate classes taxed if I already have an undergraduate degree?
- A.** If you already have an undergraduate degree, an undergraduate class you are taking must be taxed if it can be counted toward a graduate degree.
- Q.** If I am auditing an undergraduate class, would my class be taxed if I have an undergraduate degree?
- A.** If someone is auditing an undergraduate class, regardless if they already have an undergraduate degree, it is not taxable.
- Q.** Are dependents given any kind of priority or preference in the admissions process?
- A.** It's definitely taken into consideration but students get into the University on their own merits.

- Q.** Are spouses eligible for the staff tuition benefit and if not, is that something you would consider doing?
- A.** They are not eligible at this time. If that's something Staff Council wants to take to University Leadership, we can certainly discuss it.
- Q.** If we voice concerns to Staff Council, and then they go to HR, where do things go after?
- A.** They are taken up with the University leadership team. Michelle has been meeting regularly with both Tim Leonard and University leadership from 6th floor Warner. *

* Gina Casalegno, Vice President of Student Affairs and Dean of Student Affairs, clarified what "6th floor Warner" is – the President, the Provost, six Vice Presidents, in collaboration with deans and occasional guests.