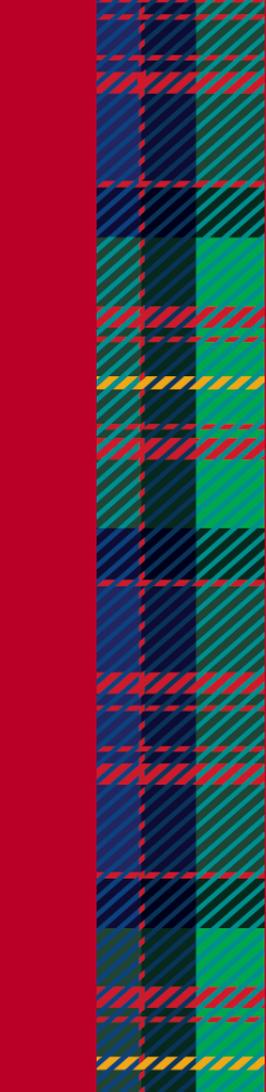


Carnegie Mellon University

Tuition Benefit Open Forum

Wednesday, March 21, 2018

Sponsored by CMU Staff Council



Carnegie Mellon University

Tuition Benefits and Application Processing

Office of Human Resources

Michelle Piekutowski, *AVP & Chief Human Resources Officer*

Becky McGhee, *Senior Benefits Administrator*

Barbara Baker, *Global HCM Advisor*

Staff Benefits: Tuition

Partnership between Staff Council and HR

- Opportunity for HR to provide meaningful information
- Staff input through questionnaires and open forums

Feedback

- Concerns expressed
- Next steps

Ongoing partnership with Staff Council

- Discussions
- Recommendations
- Presentations

Tuition Benefits for Staff Members

Benefit Level

- Courses taken at Carnegie Mellon – 100% tuition remission
Equates to up to \$ 17,592 per term
- Courses taken at another institution – 50% tuition assistance

Eligibility

- Full-Time and Part-Time Staff Members
- Must complete six months of benefits eligible service on or before the first day of the full semester on the Pittsburgh campus

Tuition Benefits for Staff Members

Number of Classes

- Full-Time Staff Members – Two courses at any one time per term (at one or more institutions)
- Part-Time Staff Members – One course at any one time at Carnegie Mellon only

Content

- Courses taken at Carnegie Mellon: Any
- Courses taken at another institution: Career –related/ part of a career related degree program

Tuition Benefits for Staff Members

- Federal tax laws:
 1. Require employers to tax graduate level tuition as income.
 2. Graduate tuition benefits exceeding \$5,250 per calendar year are subject to federal withholding
 3. Any tuition benefit for courses taken outside Carnegie Mellon are subject to state and local tax
- Applicable taxes are deducted over three months or through the calendar year, whichever is less

Tuition Benefits for Dependent Children

Benefit Level

- Attending Carnegie Mellon – 100% tuition remission
Equates to up to \$ 52,732 per year
- Attending another institution – Up to \$6,820 tuition assistance

Employee Eligibility

- Full-time, benefits-eligible staff members **who have completed five full years of service** by the following dates:
 - Fall Term — October 1
 - Winter/Spring Term — February 1
 - Summer Term — July 1

Tuition Benefits for Dependent Children

Child Eligibility

- Must be accepted into and enrolled in an undergraduate degree program before age 30
- Must be naturally born to or legally adopted by the employee and must meet IRS dependency exemption criteria
- Children attending another institution must be enrolled full time (except for the summer term)

Tuition Benefits for Dependent Children

Number of Eligible Children

- Attending Carnegie Mellon: Unlimited
- Attending another institution: Up to two per family

Semesters Covered

- Up to eight semesters per child
- Unused semesters may not be transferred to another child

Taxation

- Attending Carnegie Mellon: Not subject to federal, state, or local taxes
- Attending Another Institution: Subject to state & local taxes

Tuition Benefits — FAQs

What is the definition of “course”?

A course is defined as a 9- or 12-unit semester-length course during any term on the Pittsburgh campus. Courses taken outside of CMU are defined as the equivalent of a 9- or 12- unit semester length course during any term on the Pittsburgh campus.

Can I take more than two minis in a term?

Up to four minis may be taken per term, as long as no more than two are taken at the same time.

I am interested in enrolling in a certificate program. Is it covered?

No, only credit bearing courses are covered by the tuition benefit.

Tuition Benefits — Frequently Asked Questions

I dropped my course after the add/drop period. Can I still use the tuition benefit?

Yes, you can still use the tuition benefit to cover that course. You will still be responsible for taxes, if applicable.

My dependent is attending a non-traditional school, like a trade school. Is this covered by the benefit?

Yes, if your dependent is enrolled at an accredited institution, full time in a terminal degree program, it is covered by the tuition benefit.

I am leaving the university. When do my tuition benefits for myself or my dependent end?

Tuition benefits are effective through the end of the term in which you leave the university.

Steps to Submit Your Tuition Application

- Complete the supervisor form
- Finalize your course schedule
- Submit your tuition application

Andrew ID: bbaker1

Household Account (Barbara Baker Household) Employee Tuition Request

Name:	Barbara Baker
ID:	(ID will be generated when form is saved first time.)
School:	CARNEGIE MELLON ▼
Year:	Select One ▼
Term:	Select One ▼
Type:	Semester ▼
Study Level:	Select One ▼
Supervisor Form:	Download Supervisor Form
Supporting Documents:	Supervisor Request Form Required. Please upload a completed Supervisor Request form.
	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Supervisor Request Form ▼"/> <input type="button" value="Upload Attachments"/> (Add more than one attachments by repeating browse)
	<input type="button" value="Save this Request"/> <input type="button" value="Submit this Request"/>

Application Status Types

Saved: Not ready for processing

Submitted: Ready for processing

Awaiting Documentation: Documentation missing or incomplete

Awaiting Course Registration: Not yet enrolled in CMU courses

Approved – Audit Required: Processed but awaiting final approval

Processed: Approved, information sent to payroll

Andrew ID: bbaker1

[View HH Benefits History](#)

Tuition Benefits

Household Account (Barbara Baker Household) Members

	Name	Type
New Employee Request	Barbara Baker	Employee

(If a dependent child does not appear in the list, please contact the CMUWorks Service Center to have them added in Workday. If you have questions about eligibility for yourself or
For information about eligibility for tuition benefits, please visit http://www.cmu.edu/hr/benefits/benefit_programs/tuition/index.html

Pending Request(s) (3)

	Name	Request Name	Status
Update Request Cancel Request	Barbara Baker	Barbara Baker Summer All 2018	Saved
Cancel Request	Barbara Baker	Barbara Baker Fall 2017	Submitted
Cancel Request	Barbara Baker	Barbara Baker Spring 2018	Submitted

Federal Taxation

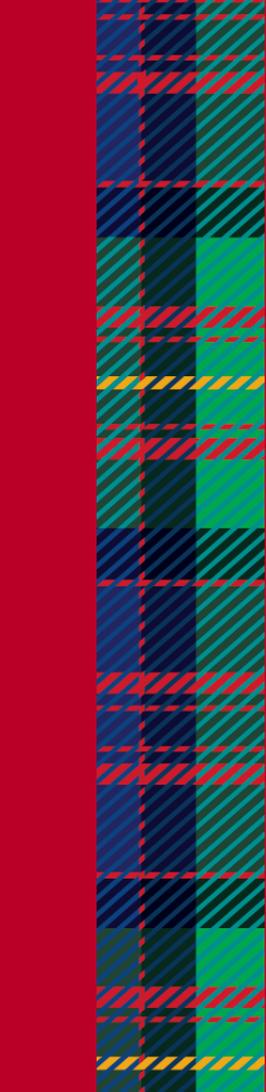
- Federal law requires employers to tax graduate level tuition as income
- Federal tax rate changed from 25% to 22% for 2018
- Undergraduate program – not taxable per federal law
- Graduate program – taxable per federal law
- Consult your tax specialist

Tuition Application Processing Begins

- **Fall semester — July 15**
- **Spring semester**
 - Outside schools —
 - *first working day in January (taxation in semester year, following normal schedule)*
 - *request made to process in December (total taxation deducted from last paycheck in December)*
 - CMU applications — January 15
- **Summer semester — May 1**

Helpful Hints

- School set up for AP payment processing
- Forward any changes to your course schedule after submission to cmu-works@andrew.cmu.edu
- Once submitted, your tuition application cannot be changed by you
- Timely submission of tuition application to prevent taxation overlap
- Barb Baker — 412-268-5232 or bbaker1@andrew.cmu.edu



Carnegie Mellon University

Undergraduate Admissions

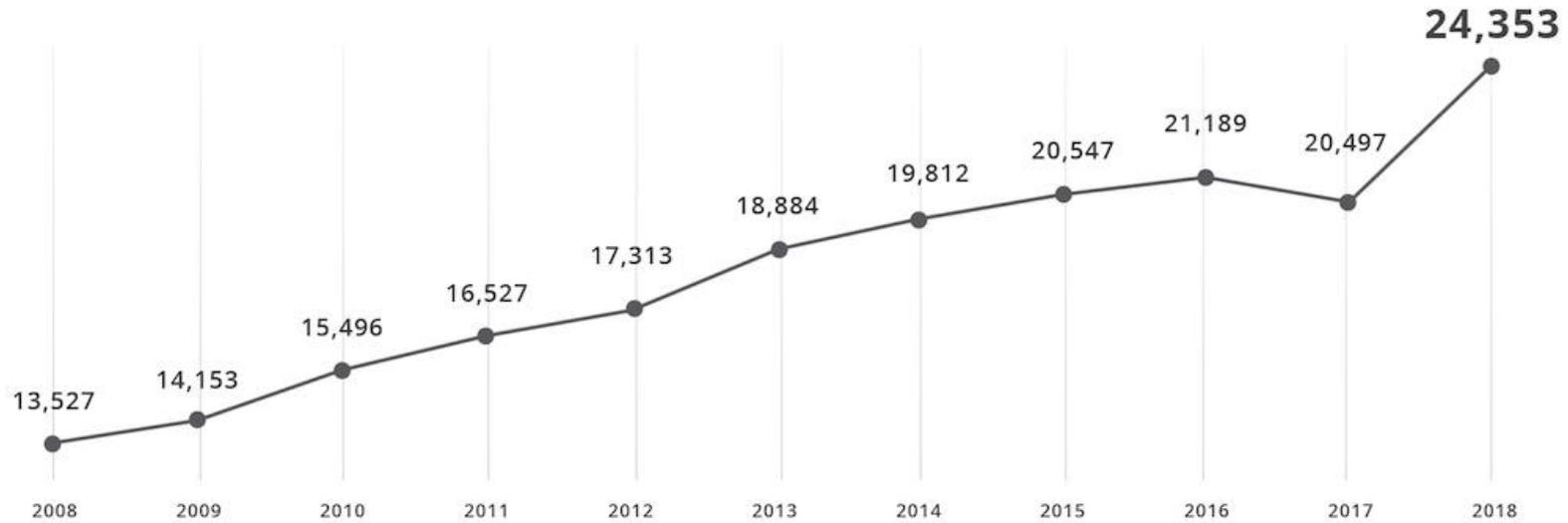
Erin Latimer

Director, Office of Admission

Application Plans

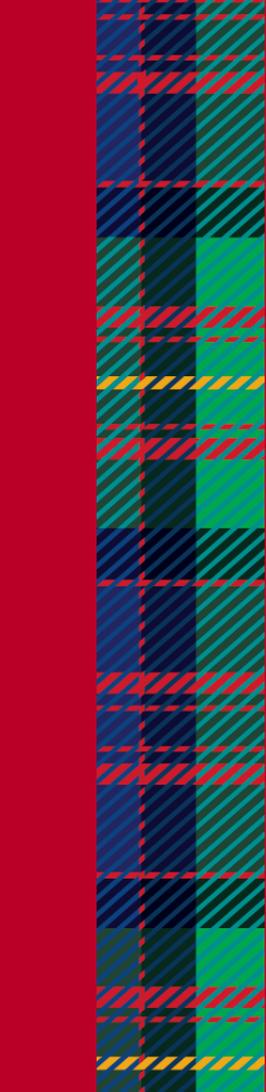
- Early Decision
- Early Admission
- Regular Decision

10-Year Applicant Overview



Trends/What's New in Admission

- STEM Disciplines
- “Optional”
- Access/Inclusion



Carnegie Mellon University

Non-Degree Process

Amy Yearwood

Associate Director, Enrollment Services

Steps to Become a Visiting/Non-Degree Student & Register

1. Read through Visiting/Non-degree Student Guide found at:
<https://www.cmu.edu/hub/registrar/registration/visiting-non-degree.html>
2. Submit the non-degree petition at least 2 weeks before the beginning of the semester. *If your child who is a minor is trying to take a non-degree course, the petition should be submitted even earlier.*
3. After you receive start-up email, log into SIO and attempt to register for coursework. *If you are unable to register yourself due to pre-requisites, contact instructor asking for permission to enroll. If permission is granted, forward message to Amy Yearwood to become registered.*
4. If you'd like to audit the class or take it pass/fail, submit the appropriate form by the date listed on the Academic Calendar.
5. Throughout the class, follow any and all Academic Calendar deadlines for adding/dropping/withdrawing.
6. If you'd like a transcript showing your coursework, you can request it via SIO or at The HUB.

Non-Degree - Frequently Asked Questions

I just want to audit a course, do I have to sign up as a non-degree student?

- Yes, you must become enrolled in a course to request to audit it.

What if I end up on the waitlist?

- Degree-seeking students have the highest priority in registration/enrollment so you will have to wait until any reserved spaces have been offered up to degree-seekers. Attend the class the first week to speak with the instructor about gaining admission.

Can I take graduate level coursework?

- Yes – as long as the instructor grants permission, you can enroll in undergraduate OR graduate level coursework. See the Benefits site about any tax implications.

I registered for the course(s), and the tuition was applied to my account, but the benefits have not covered it. Why is that?

- Submitting a visiting/non-degree petition will make it possible for you to register for coursework, but is a separate process from requesting your tuition remission benefits. Make sure you complete both processes.

Non-Degree - Frequently Asked Questions

If I take all of the courses required for a particular degree as a non-degree student, will I be able to receive the degree?

- The only way to receive a degree from CMU is to apply and become admitted into a degree program. Regardless of the coursework completed, if you are not admitted into a degree program, you will not receive a degree. Speak with Undergraduate Admission about applying to an undergraduate program and see the Departmental Graduate Coordinator to learn about admission into a master's or doctoral program.

Are there any additional requirements/concerns for minors taking non-degree coursework?

- Yes – minor non-degree students can only enroll in a course taught by an instructor who has gone through the Act 153 clearance process. Any minor interested in taking non-degree coursework should contact me (Amy Yearwood) as soon as possible before the semester to find out what coursework is available to them.

For More Information

Amy Yearwood

amymly@andrew.cmu.edu

412-268-9796

<https://www.cmu.edu/hub/registrar/registration/visiting-non-degree.html>

Questions?