



# **2021 Faculty/Staff Education Benefits Webinar**



# Today's Objectives

- Learn about the benefits available to you
- Review where to find information
- Review the administrative process
- Learn about the Symmetry Calculator – to get an estimate of your net pay



# Tuition Remission Eligibility

You and your legal spouse or same-sex domestic partner are eligible for university-sponsored educational benefits if:

- you have at least four months full-time employment with the university prior to **the last day of late registration**; and
- you are a full-time faculty member; or
- you are a regular, full-time staff member.



# 2021/2022 Eligibility Hire Dates

To be eligible to use the education benefit in the following semesters you must have a full-time hire date of:

**Spring 2022: 9/13/21 or earlier**

**Summer 2022: 1/13/2022 or earlier**

**Fall 2022: 5/2/2022 or earlier**



# 2022 Application Deadlines

To use the education benefit in the following semesters you must submit the tuition remission application and the online Hybrid Work Agreement by:

**Spring 2022: 1/14/2022**

**Summer 2022: 5/13/2022**

**Fall 2022: 9/2/2022**



# Tuition Remission Coverage

## What Is Covered?

- A maximum of 8 credits per semester
- A maximum of 20 credits per academic year (fall, spring, summer)

Courses may not be taken during working hours unless you meet the criteria and have an approved:

- Hybrid Work Agreement\*

\*Due by the application deadline



# Tuition Remission Coverage Exclusions

## What Is **Not** Covered?

- Application, exam or matriculation fees
- Course or lab fees
- \$50 administrative fee (non-refundable)

## Some courses are not eligible

The ineligible program list can be found on the HR education benefits webpage. The list includes:

- Instructional Revenue Center
- Online Partnership Programs
- Institutes, mini-sessions, inter-sessions, special sessions
- Summer: Internships/Co-ops, Independent Study/Reading



# myAU Portal

The screenshot shows the myAU Portal website interface. At the top, there is a navigation bar with the myAU logo and the text "myAU PORTAL". Below this, there are links for "Email", "AU+Me", "Sign Out", and "Catherine Anyaso". A search bar is also present. The main content area is divided into several sections:

- PERSONALIZED LINKS:** A search bar for links.
- MAIN MENU:** A list of links including "WORK @ AU", "AhealthyU (Faculty and Staff Wellness)", "ASuccessfulU", "Benefits for Adjunct Faculty", "Benefits for Part-Time Staff", "Benefits: myBenefits", "Benefits: myBenefits - Retirement", "Child Development Center", "Code of Business Ethics", "Compliance Portal", "Dependent Child Educational Benefits Application", "Directory of Staff & Faculty", "Eagle Service - Banking Information", and "Eagle Service - Pay Selection".
- Campus Feeds:** A section for "DC Alerts" and "CAMPUS NEWS" with articles such as "Searching for a New Job? New Study Says Talking to Friends and Family Boosts Chances of Success", "Charley Fogel, CAS/BA '13, Helps Fellow Alums Navigate Career Development", "Meet AU SOC's New Comedian in Residence", "SIS's living peace legend: Abdul Aziz Said", and "Student Covers the Human Impact of Ending TPS for Salvadorans".
- CONNECT TO THE NEW AND FASTER eaglesecure WIRELESS NETWORK:** A promotional banner for the wireless network, highlighting "HIGHER CONNECTION SPEEDS", "MORE BANDWIDTH", and "BETTER SECURITY & COVERAGE".
- CAMPUS LINKS:** A list of links including "AU Public Web Site (www.american.edu)", "HR Payroll Connection", "Time Sheets", "Directory of Staff & Faculty", "Directory of Departments", "Training Opportunities", "Live Webcams", "Team Sites", "Directory of Services", and "Faculty Senate Resources".
- MY LINKS:** A section stating "There are no links to display yet." and a "Manage Bookmarks" link.

## myau.american.edu Portal Account:

- Access the tuition remission application under Work@AU (can also access through HR webpage)
- Access your student account under the Finances drop down





# Online Tuition Remission Application

A screenshot of a web browser displaying the myAU Portal staff home page. The browser's address bar shows the URL https://myau.american.edu/staff/pages/default.aspx. The page has a blue navigation bar with the following menu items: HOME, ACADEMICS, FINANCES, LIFE @ AU, SERVICES, TECHNOLOGY, and WORK @ AU. A search bar on the right of the navigation bar contains the text "Search Everything". A dropdown menu is open from the "LIFE @ AU" menu item, listing the following options: Federal Work Study Job Listing, Federal Work Study Program Website, Foreign National Appointment Schedule, Foreign National Taxation and Compliance Guide, Helpful Tax Assistance Websites, Holiday Schedule, HR Training Registration, HR/Payroll Connection, HR: Staff Awards Nomination, Human Resources Website, Job Openings - Faculty, Job Openings - Staff, Job Openings - Student, PMP: Performance Management Program, Start at AU Onboarding Program, Student Jobs Web Site, Time Sheets, Tuition Remission Application, W-2 Electronic Consent, W-2 Statements, and Wage Statements. A large red arrow points to the "Tuition Remission Application" option in the dropdown menu.



# Online Tuition Remission Application

AU Tuition Remission Application - Form



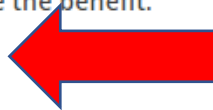
## TUITION REMISSION APPLICATION

### YOUR TUITION REMISSION APPLICATION: A VALUABLE BENEFIT -- FASTER. EASIER.

American University offers employees and their spouses/domestic partners valuable Educational Benefits - and now the process to apply for these benefits is easier than ever! Follow the steps below to take advantage of this new feature. As the educational benefit is so important, please be sure that you read these steps so that the process goes smoothly and your student account is credited properly.

The online application must be completed and submitted EVERY semester you or your spouse/same-sex domestic partner intend to use the benefit.

[Start a new application](#)



Tuition Remission Application

STUDENT NAME	STUDENT_STATUS	REQUEST STATUS	REQUEST DATE	SEMESTER	YEAR
✓					

### Questions?

Contact the Benefits Team by emailing

[hrpayrollhelp@american.edu](mailto:hrpayrollhelp@american.edu) or calling 202-885-3836.

### Additional Resources

[Hybrid Work Agreement Form](#)

[Programs Ineligible for Tuition Remission](#)

[Tuition Remission Taxation Information](#)

### Symmetry Tax Calculator

This calculator is not supported by browsers Internet Explorer 10 and below. For best results, use the Google Chrome or Mozilla Firefox browsers.

[Tuition Calculator](#)



# Online Tuition Remission Application

EMPLOYEE INFORMATION	
Request Date:	05/08/2017
Name:	<input type="text" value="Dave Null;"/>
AU ID:	<input type="text" value="8675309"/>
Full Time Hire Date:	<input type="text" value="1/1/2007"/> <small>NOTE: If you do not have this information, please contact Human Resources at x2591.</small>
STUDENT INFORMATION	
Student Name:	<input type="text" value="Jenny Jenny"/>
Student AU ID:	<input type="text" value="8675309"/>
Does the student have any class(es) which would require a Work Schedule Exception for Course Registration?	<input type="radio"/> YES <input checked="" type="radio"/> NO <input type="radio"/> NO (Student is not an AU employee)
Is the student eligible to receive Tuition Remission through another position on campus?	<input type="radio"/> YES <input checked="" type="radio"/> NO <input type="radio"/> NO (Student is not an AU employee)
<p>Submission of this application does not automatically indicate approval for the tuition remission benefit.</p> <p><b>By submitting this application to Human Resources, you indicate that you have read and understand the Policies and Procedures related to the Tuition Remission Benefit.</b></p> <p>Special Remarks:</p>	
<p><input type="button" value="Review"/> <input type="button" value="Cancel"/> <input type="button" value="Previous"/></p>	

## To Apply:

- Acknowledge the Policies, check the box and click, “I Agree.”
- Read and check each of the Procedures, and click, “Next.”
- Complete the online application.
- Click “Review,” and ensure that you’ve filled out the application accurately and completely.
- Click “Submit.”



# Tuition Remission Approval Process

## How The Process Works

- Enroll in classes first, then apply for Educational Benefits
- HR and Student Accounts verify eligibility
- Financial Aid posts the tuition benefits amount to your account
- If taking classes within work schedule, completed Hybrid Work Agreement is required



# Eagle Finance Location

The screenshot shows the myAU portal interface. At the top right, there are links for "Email", "Blackboard", "AU+Me", "Sign Out", and a user profile for "Dave Null". A search bar contains "Search Everything". The main navigation bar includes "HOME", "ACADEMICS", "FINANCES", "LIFE @ AU", "SERVICES", "TECHNOLOGY", and "WORK @ AU". A left sidebar menu lists "Staff - Home", "PERSONALIZED LINKS", "ACADEMICS", "FINANCES", "LIFE @ AU", "SERVICES", "TECHNOLOGY", "WORK @ AU", and "OFFICE ASSISTANT". A dropdown menu is open under "FINANCES", listing "Budget/IRC Forms & Resources", "Cell Phone Allowance Information", "Controller's Forms & Resources", "EagleBucks", "Financial Aid", "Give to AU", and "Student Accounts". A red arrow points to the "Student Accounts" option. The main content area features a "Today @ AU" section with a "Staff" sub-section containing 5 items, including announcements about a pedometer challenge, tuition remission workshop, and staff appreciation week. A banner for "Save the Date! HUMAN RESOURCES STAFF APPRECIATION WEEK MAY 22 - 26, 2017" is also visible. At the bottom, there are "CAMPUS LINKS" such as "AU Public Web Site", "HR Payroll Connection", and "Training Opportunities".



# Eagle Finance Location

## 🏠 Student Accounts - Home

- Budget/IRC Forms & Resources
- Cell Phone Allowance Information
- Controller's Forms & Resources
- EagleBucks
- Financial Aid
- Give to AU

### Student Accounts

Welcome to the Office of Student Accounts the central billing resource for American University. Please navigate through our menu links listed below to learn more about our services and to find relevant important information related to tuition and fees.

The mission of the Office of Student Accounts is to support the University's goals by providing quality service to achieve financial resolutions for our students and their families

#### Announcements

#### Important Links

- [Student Accounts Website](#)

#### Informational Links

✓	📄	EDIT	URL	NOTES
	📄		<a href="#">Student Authorization Form</a>	...
	📄		<a href="#">Parent Authorization Form</a>	...

#### Forms

#### STUDENT ACCOUNT SERVICE LINKS

Search Links 🔍

#### MAIN MENU ^

#### 🛡️ STUDENT ACCOUNT v

[1098T Information](#)

[Alternative Break e-Payment](#)

[American Payment Plan](#)

[Ameriplan](#)

[Eagle Finance for Students](#)

[Eagle Service - Financial Information](#)

[FERPA Information](#)

[Financial Restrictions](#)

[Payment Information](#)

[Student Refunds](#)

[Tuition and Fees](#)







# Tuition Remission Award Amount

## EAGLE SERVICE

Hello, Welcome to Eagle Service!

Choose a category to get started.



### Student Finance

Here you can view your latest statement and make a payment online.



### Banking Information

Here you can view and update your banking information.



### Employee

Here you can view banking information.



# Tuition Remission Taxation





# Tuition Remission Taxation

## What Is Taxable?

Per IRS regulations, graduate-level (and some undergraduate) education received as a benefit of employment is taxable.

- You, the employee, can exclude up to \$5,250 of that benefit each tax (calendar) year.



# Tuition Remission Taxation

## What Is Taxable (cont'd)?

- Undergraduate Level Courses: 100% taxable for domestic partners
- Graduate Level Courses: 100% taxable. Eligible full-time faculty and staff receive \$5,250 annually of tax-free graduate tuition. Applied to first semester you use the benefit in the calendar year. (Does not apply to domestic partners or spouses)



# Tuition Remission Taxation

## How Are These Taxes Applied?

- The first \$5,250 of your graduate tuition for each calendar year is tax-free (faculty and staff only). Once you've exhausted that allowance, the remainder of your graduate tuition is 100% taxable.
- Divide the total taxable amount over 3-months' pay:
  - Monthly employees: 3 pay periods.
  - Bi-weekly employees: 6 pay periods.



# Tuition Remission Taxation

Example (check tuition rate chart on AU website for actual rate for the semester)

If you take six graduate credits at \$1,631 per credit, your tuition will be \$9,786. The first \$5,250 is tax-free, so the taxable tuition for the semester is \$4,536 (\$5,250 is applied first semester you take graduate courses in the calendar year).

- Bi-weekly: \$756 added to taxable amount per pay period.
- Monthly: \$1,512 added to taxable amount per pay period.



# Tuition Remission Taxation

Example (check tuition rate chart on AU website for actual rate for the semester)

Once you've exhausted the \$5,250...

If you take six graduate credits at \$1,631 per credit, your tuition will be \$9,786. This is your taxable tuition for the semester.

- Bi-weekly: \$1,631 added to taxable amount per pay period.
- Monthly: \$3,262 added to taxable amount per pay period.



# Tuition Remission Taxation

## When Are Taxes Applied?

Taxable Tuition is applied during the semester in which the employee receives the benefit:

- Spring: February, March and April
- Summer: June, July and August
- Fall: October, November and December

For bi-weekly employees, taxation will begin with the first paycheck that you receive in the scheduled month.



# Tuition Remission Taxation

What Does This Mean For Me?

Taxation on remitted tuition can significantly reduce your net (take-home) pay. Specific amounts withheld take into account personal exemptions, pre-tax benefits, Federal and State filing status, gross income, etc. Tuition benefits could even push you into a higher tax bracket. It is therefore not possible for us to tell you exactly how this will affect your pay.



# Symmetry Calculator





# Symmetry Calculator

## Three Simple Steps

1. Find your earnings statement (myAU portal)
2. Confirm tuition amount posted in Eagle Finance
3. Enter the information into the Symmetry Calculator

Tip: Enter information without tuition to see how close to your current net pay the calculator gets



# Symmetry Calculator



American University  
4400 Massachusetts Avenue  
Washington, DC 20016-8054

Employee: Mr. Clawed Z. Eagle  
4400 Massachusetts Ave NW  
Washington, DC 20016

Period Beginning: 11/4/2017  
Period Ending: 11/17/2017  
Pay Date: 12/1/2017

Employee ID: 9999999  
Position: University Mascot

## Earnings Statement

Amt. This Period Year to Date

Net Pay \$1,326.33 \$29,409.73

Advice # 197231

Federal Withholding Status: Single  
State Withholding Status: Single  
Federal Exemptions: 2  
State Exemptions: 1  
Add'l Federal Withholding: \$0.00  
Add'l State Withholding: \$0.00

### Earnings

Earnings Type	Hours	Rate	This Period	Year To Date
Holiday Pay	-	-	-	\$1,745.10
Regular Earnings	70.00	\$26.30	\$1,841.00	\$36,651.00
Overtime 1.0	1.00	\$26.30	\$26.30	\$348.80
Overtime 1.5	-	-	-	\$104.82
Sick Leave	-	-	-	\$1,076.40
Vacation Leave	-	-	-	\$1,183.50

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- Prepare Form
- Send for Signature
- Send & Track
- Compare Files

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# Symmetry Calculator

Earnings Statement - Sample 020918 Final.pdf - Adobe Acrobat Pro DC

File Edit View Window Help

Home Tools Earnings Statement... x Sign In

1 / 2 125%

### Taxes, Benefits, and Other Deductions

	Employee	Employee YTD	Employer	Employer YTD	Applicable Gross	Applicable Gross YTD
<b>Taxes</b>						
FICA - Medicare	\$25.39	\$568.29	\$25.39	\$568.29	\$1,751.09	\$39,192.83
FICA - Soc Security	\$108.57	\$2,429.96	\$108.57	\$2,429.96	\$1,751.09	\$39,192.83
Federal W/H Tax Single	\$183.35	\$4,378.44	-	-	\$1,741.88	\$38,952.61
DC W/H Tax - Single	\$93.40	\$2,062.16	-	-	\$1,741.88	\$38,952.61
Dc Unemployment Insurance	-	-	-	-	-	-
<b>Benefits</b>						
Basic AD&D Insurance	-	-	\$0.33	\$7.47	\$1,841.00	\$40,656.00
Basic Life Insurance	-	-	\$2.66	\$59.72	\$1,841.00	\$40,656.00
Delta Dental Comp Individual Pre-Tax	\$12.97	\$311.28	\$4.32	\$103.68	\$1,841.00	\$40,656.00
Employee Optional Personal Accident Insurance	\$0.33	\$7.52	-	-	\$1,841.00	\$40,656.00
Jacobs Fitness Ctr Sin	-	\$26.43	-	-	-	\$3,570.00
Kaiser Permanente Individual Pre-Tax	\$45.09	\$1,082.16	\$180.36	\$4,328.64	\$1,841.00	\$40,656.00

Page 1 of 2

Find your tools here

- Create PDF
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- Comment
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- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form
- Send for Signature
- Send & Track
- Compare Files

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# Symmetry Calculator

- Where Do I Find The Calculator?
  - Browsers to use: Firefox or Google Chrome
  - Go to HR webpage: [www.american.edu/hr](http://www.american.edu/hr)
  - Click on Benefits
  - Select Education, then Tuition Remission, then Apply for Tuition Remission (right side)
  - Log in to myAU portal to access Tuition Remission application
  - “Symmetry Software ® Calculator” is on the right-hand side under “Additional Resources”



# Symmetry Calculator

- Important Information:
  - The calculator that is provided on this web site is only meant to provide general guidance and estimates about the payroll process. It should not be relied upon to calculate exact taxes, payroll or other financial data. It may not match your American University results precisely and is not intended to provide tax or legal advice. You should consult with a professional advisor or accountant to address your specific concerns.



# Symmetry Calculator

File Edit View History Bookmarks Tools Help

AU Tuition Remission App... X +

https://myau.american.edu/forms/hr/tra/Pages/Application.aspx?LinkID=821

Search

MYAU HOME Search this site

3

3

3

**Symmetry Tax Calculator**

This calculator is not supported by browsers Internet Explorer 10 and below. For best results, use the Google Chrome or Mozilla Firefox browsers.

**Tuition Calculator**

General Information

**Check Date**  
01/10/2018

**State**  
Arizona

**Full tuition amount (Semester)**  
0

**Gross Pay**  
0

**Gross Pay YTD**  
0

**Pay Frequency**  
Bi-weekly

**Exempt from**

No Federal

No Fica

No Medicare

Federal Information



## Resources

- At the end of the year, you will receive a 1098-T statement and a W-2 statement.
- Questions about the W-2 or earnings statements:
  - email [hrpayrollhelp@american.edu](mailto:hrpayrollhelp@american.edu)
- Questions about the 1098-T:
  - email [aucentral@american.edu](mailto:aucentral@american.edu)
- Tuition remission taxation appears on your earnings statements so please review those regularly. The amount on your last earnings statement for the year will show the tuition amount you were taxed on for the calendar year.



# Resources

## Registering for classes

- AU Central [aucentral@american.edu](mailto:aucentral@american.edu), x8000 or <https://www.american.edu/provost/registrar/studentservices/registration.cfm>

## Academic Calendar

- <https://www.american.edu/provost/registrar/academic-calendar.cfm>

Information on last day to drop a course for 100%, 50%, 25% refund

**\*If you are leaving the university in the middle of the semester, let HR know**

## Tuition rates and mandatory fees

- <https://www.american.edu/finance/studentaccounts/tuition-and-fees-information.cfm>





## Resources

- HR Website: <https://www.american.edu/hr/benefits/educationbenefits.cfm>  
Information on education benefits, application deadlines, links to application
- Mandatory Student Health Insurance: <https://www.american.edu/aucentral/>  
If you are a full-time faculty/staff member and a full-time student, you will be billed the AU Student Health Insurance fee. If you are covered by your employee health insurance with American University or through a spouse's health insurance that provides comparable coverage to the AU Student Health Insurance Plan, you may be eligible to waive the student health insurance fee. Waiver instructions will be sent to students in the spring every academic year of enrollment.



# Contact Information

HR Benefits Team

[hrpayrollhelp@american.edu](mailto:hrpayrollhelp@american.edu)



**Questions?**