2019
TUITION REMISSION
WORKSHOP
Goals of this Workshop

- Familiarize you with the educational benefits for faculty, staff, spouses and same-sex domestic partners
- Review where to find program information
- Learn more about the resource – Symmetry Calculator
- Review the administrative process
Eligible faculty and staff members of American University are provided with a comprehensive educational benefits program. This includes tuition remission for eligible faculty and staff members and their spouses or same-sex domestic partners.
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.
2019 Hire Dates for Eligibility

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

**Spring 2019**
September 18, 2018 or earlier

**Summer 2019**
January 17, 2019 or earlier

**Fall 2019**
May 1, 2019 or earlier
WHAT IS COVERED?

- A maximum of 8 credits per semester
- A maximum of 20 credits per academic year

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

- Flexible Work Arrangement; or
- Work Schedule Exception

These documents are also due by the application deadline.
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 myBenefits site and includes:
- Instructional Revenue Center
- Online Partnership Programs
- Institutes, mini-sessions, inter-sessions, special sessions
- Summer: Internships/Co-ops, Independent Study/Reading
Log onto the myAU portal and go to the myBenefits site.

- Work@AU > myBenefits
Educational Benefits at American University
Online Tuition Remission Application

Education Benefits for Faculty/Staff & Their Spouse/Same-Sex Domestic Partner

American University offers tuition remission for eligible employees, spouses and same-sex domestic partners at American University and Moody Theological Seminary.

For more Information, please refer to the Faculty/Staff Benefits Manual.

Key Information

- Online application must be submitted EVERY semester!
- The online application must be completed and submitted EVERY semester you or your spouse/same-sex domestic partner intends to use the benefits. To access the online application for tuition benefits, select Remanted Links in the AU portal, go to Workday, and select Tuition Remission Application.

Please note: the University offers a non-grantable application fee and that student fees are not included under tuition remission.

Eligibility

- Must be a full-time faculty member or full-time staff member or legal spouse or same-sex domestic partner
- Have at least four months of full-time employment with the university prior to the last day of late registration (see Tuition Remission Key Deadlines for dates)

Enrollment Process

Here are the steps in the enrollment process:

- Identify the course you wish to take and meet with your school’s advisor to be cleared for registration
- If you are interested in a degree program, you will need to apply and be accepted for admission to the program
- Review the list of ineligible Academic Programs to make sure your (or spouse’s) course is covered by tuition remission. If you have any questions about the eligibility of a course, contact HR
- Register for the course either online, in-person at the Registrar’s Office, or through your advisor, as applicable
- Complete and submit the Tuition Remission online application
- Human Resources oversees the administration of the University’s tuition remission benefits. If your tuition remission application is denied, you will be contacted. You may confirm that verified tuition has been posted to your account by reviewing your account through Eagle Finance, located in the Finance section of your Renamated Links at myAU.american.edu.
Educational Benefits at American University
Online Tuition Remission Application

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

<table>
<thead>
<tr>
<th>STUDENT NAME</th>
<th>STUDENT STATUS</th>
<th>REQUEST STATUS</th>
<th>REQUEST DATE</th>
<th>SEMESTER</th>
<th>YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Biweekly</td>
<td>Approved</td>
<td>5/5/2014</td>
<td>Summer</td>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>Staff Biweekly</td>
<td>Approved</td>
<td>8/18/2014</td>
<td>Fall</td>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>Staff Biweekly</td>
<td>Approved</td>
<td>11/26/2014</td>
<td>Spring</td>
<td>2015</td>
<td></td>
</tr>
</tbody>
</table>

Questions?
Call the Benefits Team at x3400 or email autuitionbenefits@american.edu.

Additional Resources
- Work Schedule Exception Request Form
- Flex Work Arrangement Request Form
- Programs Ineligible for Tuition Remission
- Tuition Remission Taxation Information
Educational Benefits at American University
Online Tuition Remission Application

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.”
Educational Benefits at American University
2019 Tuition Remission Deadlines

**Spring 2019**
January 18, 2019

**Summer 2019**
May 17, 2019

**Fall 2019**
August 30, 2019
HOW THE PROCESS WORKS

• Enroll in classes, THEN apply for Educational Benefits.
• HR and Student Accounts verify eligibility.
• Financial Aid posts the tuition benefits amount to your account.
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.

Important Links
- Student Accounts Website

Informational Links
- Student Authorization Form
- Parent Authorization Form

Forms
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.
WHAT IS TAXABLE?

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

- You, the employee, can exclude up to $5,250 of that benefit each tax (calendar) year.
# Educational Benefits at American University

## Tuition Remission Taxation

<table>
<thead>
<tr>
<th></th>
<th><strong>Undergraduate Level Courses</strong></th>
<th><strong>Graduate Level Courses</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty and Staff</strong></td>
<td>0% taxable</td>
<td>$5,250 tax-free annually 100% taxable after $5,250</td>
</tr>
<tr>
<td><strong>Spouses</strong></td>
<td>0% taxable</td>
<td>100% taxable</td>
</tr>
<tr>
<td><strong>Same-Sex Domestic Partners</strong></td>
<td>100% taxable</td>
<td>100% taxable</td>
</tr>
<tr>
<td><strong>Dependents</strong></td>
<td>0% taxable</td>
<td>100% taxable</td>
</tr>
</tbody>
</table>
Educational Benefits at American University
Tuition Remission Taxation

HOW ARE THESE TAXES APPLIED?

• The first $5,250 of your graduate tuition for each calendar year is considered to be tax-free. Once you’ve exhausted that allowance, the remainder of your graduate tuition is taxable.

• Divide the total taxable amount over 3-months’ pay:
  • Monthly employees: 3 pay periods.
  • Bi-weekly employees: 6 pay periods.

• The pay period amount will be added into the “Federal Taxable Amount” of your paycheck.
Example
If you take six graduate credits at $1,708 per credit, your tuition will be $10,248. The first $5,250 is tax free, so the taxable tuition for the semester is $4,998.

• Biweekly: $833 added to taxable amount per pay period.
• Monthly: $1,666 added to taxable amount per pay period.

Any graduate credits taken for the remainder of the calendar year are 100% taxable.

If you take six graduate credits the following semester, all $10,248 is considered to be taxable.

• Biweekly: $1,708 added to taxable amount per pay period.
• Monthly: $3,416 added to taxable amount per pay period.
WHEN ARE THESE 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 biweekly employees, taxation will begin with the first paycheck that you receive in the scheduled month.
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.
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
### Earnings Statement

**Employee:** Mr. Clawed Z. Eagle  
**Employee ID:** 9999999  
**Position:** University Mascot

<table>
<thead>
<tr>
<th>Earnings Type</th>
<th>Hours</th>
<th>Rate</th>
<th>This Period</th>
<th>Year To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Holiday Pay</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$1,745.10</td>
</tr>
<tr>
<td><strong>Regular Earnings</strong></td>
<td>70.00</td>
<td>$26.30</td>
<td>$1,841.00</td>
<td>$36,651.00</td>
</tr>
<tr>
<td><strong>Overtime 1.0</strong></td>
<td>1.00</td>
<td>$26.30</td>
<td>$26.30</td>
<td>$104.82</td>
</tr>
<tr>
<td><strong>Overtime 1.5</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Sick Leave</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$1,076.40</td>
</tr>
<tr>
<td><strong>Vacation Leave</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$1,183.50</td>
</tr>
</tbody>
</table>

**Net Pay:** $1,326.33  
**Year to Date:** $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
### Educational Benefits at American University

**Tuition Remission Resource – Earnings Statement (myAU portal)**

#### Taxes, Benefits, and Other Deductions

<table>
<thead>
<tr>
<th>Employee</th>
<th>Employee YTD</th>
<th>Employer</th>
<th>Employer YTD</th>
<th>Applicable Gross</th>
<th>Applicable Gross YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Taxes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FICA - Medicare</td>
<td>$25.39</td>
<td>$568.29</td>
<td>$25.39</td>
<td>$568.29</td>
<td>$1,751.09</td>
</tr>
<tr>
<td>FICA - Soc Security</td>
<td>$108.57</td>
<td>$2,429.96</td>
<td>$108.57</td>
<td>$2,429.96</td>
<td>$1,751.09</td>
</tr>
<tr>
<td>Federal W/H Tax Single</td>
<td>$183.35</td>
<td>$4,378.44</td>
<td>$183.35</td>
<td>$4,378.44</td>
<td>$1,741.88</td>
</tr>
<tr>
<td>DC W/H Tax - Single</td>
<td>$93.40</td>
<td>$2,062.16</td>
<td>-</td>
<td>-</td>
<td>$1,741.88</td>
</tr>
<tr>
<td>Dc Unemployment Insurance</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Benefits</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic AD&amp;D Insurance</td>
<td>-</td>
<td>-</td>
<td>$0.33</td>
<td>$7.47</td>
<td>$1,841.00</td>
</tr>
<tr>
<td>Basic Life Insurance</td>
<td>-</td>
<td>-</td>
<td>$2.06</td>
<td>$59.72</td>
<td>$1,841.00</td>
</tr>
<tr>
<td>Delta Dental Comp Individual Pre-Tax</td>
<td>$12.97</td>
<td>$311.28</td>
<td>$4.32</td>
<td>$103.68</td>
<td>$1,841.00</td>
</tr>
<tr>
<td>Employee Optional Personal Accident Insurance</td>
<td>$0.33</td>
<td>$7.52</td>
<td>-</td>
<td>-</td>
<td>$1,841.00</td>
</tr>
<tr>
<td>Jacobs Fitness Ctr Sin</td>
<td>-</td>
<td>$26.43</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Kaiser Permanente Individual Pre-Tax</td>
<td>$45.09</td>
<td>$1,082.16</td>
<td>$180.36</td>
<td>$4,328.64</td>
<td>$1,841.00</td>
</tr>
</tbody>
</table>

*Page 1 of 2*
WHERE DO I FIND THE CALCULATOR?

- Browsers to use: Firefox or Google Chrome
- Go to myAU portal: myau.American.edu
- Click on “Work@AU” under Personalized Links
- Scroll down and Click on “Tuition Remission Application”
- “Symmetry Software ® Calculator” is on the right-hand side under “Additional Resources”
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.
Educational Benefits at American University
Symmetry Calculator

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
No
No
Federal
State
No
Medicare
Federal Information
QUESTIONS?
CONTACT INFORMATION

HR Benefits Team
AUTuitionBenefits@American.edu
x3400