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# Tuition Benefits Workshop Fall 2024

Human Resources

# Welcome

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## Presentation Overview:

- What are the Tuition Exchange and FACHEX programs?
- Application Process/Tips
- Tuition Remission



# What is Tuition Exchange (TE)?

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- Tuition Exchange is a competitive tuition award opportunity (**not guaranteed**) for undergraduate studies at participating colleges and universities for **IRS tax dependent children**.
- USF participates along with over 700 other private colleges and universities in TE
- Minimum TE awards for 2025-26 is \$43,000
- A complete list of participating schools may be found at: <https://te.tuitionexchange.org/memberschools>



# What is FACHEX?

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- Faculty, Administrator and Staff Children Exchange Program is a competitive tuition award opportunity (**not guaranteed**) for undergraduate studies at 25 other participating Jesuit colleges and universities for **dependent children**



- FACHEX awards cover 100% of tuition
- Click here for participating [FACHEX](#) institutions,

# Who is Eligible and What Does TE and FACHEX awards cover?

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- Tax dependent children of USF full-time faculty and staff are eligible
- Awards provide:
  - Tuition for ***undergraduate*** studies only
  - FACHEX 100%
  - TE is min award or up to 100%
  - Fall and Spring semester classes only
  - Up to 8 semesters as long as the student remains eligible
- Depending on the TE institution, room and board may be included so do your research!

# TE and FACHEX Application Process

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## 1. Student identifies schools

*Review information for deadline information may be earlier than USF*

## 2. Student creates an account on [TE Site](#)

Use email that is professional and not their high school email

***Once account is created the student can log in to complete the TE EZ-Application***

- ✓ *Some Jesuit university participates in both TE and FACHEX programs, when student submits the application it will apply them under both programs. There is not a separate application.*
- ✓ *If applying to USF, DO NOT apply under TE/FACHEX*
- ✓ *Maximum active applications is 20*
- ✓ *Must use parent's USF email address on TE EZ-Application*

# TE and FACHEX Application Process

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3. Documentation: Send Birth/Adoption Certificate & 2023 IRS tax documentation to [tuitionremission@usfca.edu](mailto:tuitionremission@usfca.edu)
4. HR reviews TE/FACHEX application for eligibility and updates application. Once approved, the schools are notified of the students eligibility.
5. Student can see update on their account

# Reminders

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## Reminders:

- *Student needs to apply for admission; **keep track of deadlines***
- *TE/FACHEX schools will contact your child directly regarding next steps and award status*
- *Best source of info is liaison officer and admission counselor*
- *Recertification Process:*

If awarded, continued eligibility is contingent upon the student maintaining any criteria set by the importing institution as well as the employee's continued eligibility as a full-time employee.



# How are students selected?

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- Both programs are highly competitive and GPA, SAT/ACT as well as extra curricular activities may be key factors
- Each institution decides how many awards it has available
- Students/Parents can [conduct a school search](#) on the TE website or visiting school site

# Are transfer students eligible?

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You need to ask this question of the schools where the student is considering transferring. Some IMPORT schools have specific policies such as “first-year, first-time students only.”

# Should I apply for Financial Aid?

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- YES!



# Important Questions to Ask If Offered an Award

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## Student can ask

- What is the scholarship amount
- Can I receive additional institutional scholarship
- What are the scholarship renewal requirements (i.e. GPA)
- Are there on-campus housing requirement
- How many semesters/quarters are covered
- Does the award cover study abroad
- Is there a limit on number of units that can be taken in a term?

# Tuition Exchange/FACHEX Terminology

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EXPORT – the home/employer school

IMPORT – where the student is seeking a TE scholarship

Export Approved – your employer has shared the TE scholarship application with the schools selected on the application

Export Denied – your employer did not approve the TE scholarship application

Imports Approved – your dependent's TE scholarship application is approved, and if the student enrolls, they will be funded.

Import Denied – the student was not offered a TE scholarship at this school

Import Waitlist – the student may be offered a TE scholarship

# Application Deadlines

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- USF TE/FACHEX Application form deadline for AY 2025-2026 is:

**December 1, 2024**

- [TE Family Webinars](#)
  - Register in advance
  - Learn about the application process, tips for communicating to ensure success & Q&A.
  - 10/7, 10/23, 11/5, 11/21, 12/9 & 12/17

# What is Tuition Remission?

- Tuition Remission is a waiver of tuition at USF for eligible employees and their eligible dependents who are admitted for enrollment at USF
- Eligibility: 1 year of full time employment before employees\* and spouses/RDP's are eligible to use the benefit. No waiting period for dependent children.

\*Employees covered under a Collective Bargaining Agreement can refer to their agreement for additional information re: eligibility

- Benefit covers tuition costs only; fees (books, housing, student fees) are the responsibility of the student
- Visit <https://myusf.usfca.edu/human-resources/benefits/tuition-benefits>

# Tuition Remission Application Process

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- Submit Tuition Remission form electronically during the appropriate filing period.
- Submit supporting documents to HR at [tuitionremission@usfca.edu](mailto:tuitionremission@usfca.edu)
- Once eligibility is verified, you will receive an email with HR's decision
- TR applications must be submitted for each semester
- TR can not be applied to courses enrolled after census date

Term	Filing Period	Due Date
Intersession/Spring	October 1-15	October 15
Summer	March 1- March 15	March 15
Fall	May 1-15	May 15



# Tuition Taxation

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Generally UG courses are not considered a taxable benefit by the IRS but graduate courses are.

If employee is the student, they are eligible for the first \$5,250 to be excluded from taxation each calendar year.

This exclusion does not apply to spouse/RDP or dependent children taking graduate courses.

EE is taxed during the semester they are using the benefit.

# Tuition Taxation

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Taxable amount is determined at census date and employee is taxed over the next 6 pay periods for semi-monthly paid employees or 3 months for monthly.

Example: 1660 per unit and registered for 8 units

EE Tuition Cost for Semester: 13,280

IRS Exclusion: -5250

Taxable Balance: 8,030

SM Paid:  $8,030/6$  pay periods = 1,338.33 added to applicable gross so taxes

(Fed, State, FICA etc) is calculated on that increased amount.

Approx Net reduction  $(1,338.33 * 37.05\%) = \$495.85$

# Contact Information

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1. TE/FACHEX/Tuition Remission  
[tuitionremission@usfca.edu](mailto:tuitionremission@usfca.edu)
2. Tuition Exchange website:  
tuitionexchange.org  
Click on Families

# Questions

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Thank you for you time!

