EDUCATION ASSISTANCE PROGRAMS

Candice Bovian
Work Life Specialist
Georgia Tech Human Resources
candice.bovian@ohr.gatech.edu
404-894-0490
AGENDA

• Education Assistance Programs:
  • TAP – Tuition Assistance Program
  • STRAP – Staff Tuition Reimbursement Assistance Program
  • GTRI Supplemental Tuition Assistance Program
  • GTRC – Georgia Tech Research Corps

• Application Process
• Tax Implications
• Program Exclusions
• Important Dates
• FAQs
• Q&A
## PROGRAM DIFFERENCES

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<th>Tuition Assistance Program (TAP)</th>
<th>Staff Tuition Reimbursement Assistance Program (STRAP)</th>
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<tr>
<td><strong>Employment Requirement</strong></td>
<td>6 months fulltime, benefits-eligible employment</td>
<td>12 months fulltime, benefits-eligible employment</td>
</tr>
<tr>
<td><strong>Eligible Colleges/Institutions</strong></td>
<td>Any USG college/institution</td>
<td>Any accredited <em>non-USG</em> college/institution</td>
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<tr>
<td><strong>Credit Limits</strong></td>
<td>Up to 9 credit hours per semester</td>
<td>Up to 6 credit hours per semester</td>
</tr>
<tr>
<td><strong>Grade Requirement</strong></td>
<td>C or better</td>
<td>C or better</td>
</tr>
<tr>
<td><strong>Assistance Method</strong></td>
<td>Tuition waiver applied up front</td>
<td>Reimbursement received after term up to the GT rate with grades and transcripts</td>
</tr>
<tr>
<td><strong>Eligible Degree</strong></td>
<td>Any degree except medical, dental, law, executive/premier</td>
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TUITION ASSISTANCE PROGRAM

The Tuition Assistance Program (TAP) is offered by the Board of Regents of the University System of Georgia

Application Process:

1. Initiate student admissions process with applicable USG school
   • Complete student application process and receive acceptance letter
2. Receive student ID number from institute
3. Complete TAP application
4. Obtain your manager’s signature on application
5. Submit original application to HR by applicable deadline, but not more than 30 days prior to deadline.
   • Hard copy only
   • Mail code: 0435
   • In-person: 500 Tech Parkway
TAP REGISTRATION PROCESS

• Confirmation email sent within 24 hours.
• Approval email sent from HR within 30 days after application deadline.
• Register for classes only during TAP employee registration period or risk losing waiver.
  • Georgia Tech: Phase II
  • Other USG Institutions: Contact appropriate institution
• Repeat the same process for each semester in which you wish to participate.
Applications collected. Confirmation of receipt emails sent.

Eligibility is reviewed.

Application sent to TAP Coordinator for grade review and employment status.

Approval email sent within 30 days after deadline or after grades are posted.

TAP Tuition Waiver applied to account by payment deadline.
**TAP TAX IMPLICATIONS**

Tax Implications for TAP Participants

The federal government currently allows up to **$5,250 annually** in employer-provided educational assistance benefits to be “tax free.”

- Applies to undergraduate and graduate-level courses.
- Educational assistance benefits in excess of $5,250 are taxable and will be reflected in Box 1 of your W-2.
- Consult a tax professional if you have questions.

Review your statement each time you register, and monitor TAP waivers for the calendar year.
STAFF TUITION REIMBURSEMENT PROGRAM

The Staff Tuition Reimbursement Program (STRAP) is offered by Georgia Tech

Application Process:
1. Initiate student admission process with non-USG accredited school.
2. Complete STRAP application in its entirety.
3. Obtain your manager’s signature on STRAP application.
4. Class start date should fall within the Georgia Tech semester that you are applying. (See next slide)
5. Class names and dates should be same on application and transcript.

Submit original application to HR by applicable deadline, but not more than 30 days prior to deadline.
- Hard copy only
- Mail code 0435
- In-person: 500 Tech Parkway
- Receive email confirming receipt shortly after submitting TAP application

***STRAP may be processed no more than three times annually per participant***
## Georgia Tech Semester Dates and Associated TAP Deadline Dates

<table>
<thead>
<tr>
<th>SEMESTER</th>
<th>SEMESTER DATES</th>
<th>TAP APPLICATION DEADLINE</th>
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<tbody>
<tr>
<td><strong>GT Fall Semester</strong></td>
<td>Mid-August – December</td>
<td>Fall TAP Application deadline: July 15</td>
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<tr>
<td><strong>GT Spring Semester</strong></td>
<td>January – beg May</td>
<td>Spring TAP Application deadline: November 15</td>
</tr>
<tr>
<td><strong>GT Summer Semester</strong></td>
<td>Mid May – end of July</td>
<td>Summer TAP Application deadline: April 15</td>
</tr>
</tbody>
</table>

You must fill out a TAP application based on your prospective school’s start date. If your school has a “Winter” term begins in October then you will need to fill out a Fall TAP Application because that “Winter” term falls within GT Fall Semester dates.
Reimbursement rates are determined at the beginning of each fiscal year.

2017 reimbursement rates are:

- Undergraduate: $203.00/credit hour
- Graduate: $287.00/credit hour

Submit the following to HR within 30 days of completion of term/class:

- Official/original transcript
- Copy of paid tuition receipt (must include name, term and amount charged/paid with a zero balance)

Reimbursement requests processed within two weeks of receipt.

If you have two classes in two (of your school’s) terms that fall within one Georgia Tech semester, then turn in your reimbursement documentation after the last class/term. For example: If you take one class during your school’s Fall term that starts mid August for 8 weeks and then take one class during your school’s Winter term which starts at the beginning of October, for 8 weeks, then turn in your documentation after the October class/Winter term because that will all fall within GT’s Fall semester. You only get one reimbursement per semester.
Applications collected. Confirmation of receipt emails sent.

Eligibility and funding is reviewed.

Approval emails are sent.

Reimbursement documents submitted to HR (within 30 days of course completion).

Email sent to request signature for payment.
PROGRAM EXCLUSIONS

- Medical degree
- Law degree
- Dental degree
- Pharmacy degree
- Non-credit continuing education courses
- Certificate courses including HVAC, PT, HR, etc.
- Student fees (STRAP)
- Executive/Premier courses (for TAP)
  - At Georgia Tech these include Executive MBA; Executive MBA in Management of Technology; Executive Master’s in International Logistics & Supply Chain Strategy
  - Check with TAP Coordinators at USG institutions for specific program questions
GTRI SUPPLEMENTAL TUITION REIMBURSEMENT

• Pays difference between what is not covered under TAP or STRAP

• Eligibility – Full-time GTRI employees with title of:
  • Research Engineer
  • Scientist
  • Technologist
  • Associate I through Principal Research Engineer

• Degree sought must be job-related

• Submit original application to GTRI’s Talent Management Department (TMD) by application deadline

GTRI Supplemental contact: Darice Whitaker at darice.whitaker@gtri.gatech.edu
GTRC TUITION REIMBURSEMENT

• Eligibility:
  • Full-time Research Faculty
  • Not eligible for TAP or STRAP

• Reimbursement from GTRC funds is similar to STRAP.
  • Up to 6 credit hours at a USG school
  • Approval for reimbursement for courses at schools outside USG must be requested in advance and requires justification, supervisor’s recommendation, and is subject to the availability of funds
    • This is generally intended to serve Georgia Tech employees who live or work in locations not served by the University System of Georgia

• Students are responsible for taxes due on tuition reimbursements or tuition paid on their behalf and should seek guidance from the I.R.S. or a tax professional.
## APPLICATION DEADLINES

<table>
<thead>
<tr>
<th>Semester</th>
<th>Deadline</th>
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<tbody>
<tr>
<td>Summer Semester</td>
<td>April 15</td>
</tr>
<tr>
<td>Fall Semester</td>
<td>July 15</td>
</tr>
<tr>
<td>Spring Semester</td>
<td>November 15</td>
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</table>

**Applications will be accepted up to 30 days prior to deadline**

### TAP & STRAP:
- HR Mail Code: 0435
- Office of Human Resources
- Benefits Department
- 500 Tech Parkway, NW
- Atlanta, GA 30332

### GTRI Supplemental:
- Mail Code: 0807
- GTRI Talent Management Department
- Georgia Tech Research Institute
- 260 14th Street, NW
- Atlanta GA 30332-0807

### GTRC Reimbursement:
- GTRI Employees: Mail code 0807
- Georgia Tech & GTRC Employees: Mail Code 0740
FREQUENTLY ASKED QUESTIONS

Am I required to work for Georgia Tech after I graduate?

TAP/STRAP do not include an employment requirement post-graduation. However, GTRI requires you stay with Georgia Tech for two years post-graduation.

May I take more hours than what’s covered?

Yes! But keep in mind, you are financially responsible for hours exceeding guidelines: TAP - 9 credits; STRAP - 6 credits.

What happens if I withdraw from a class?

You must earn a grade of "C" or higher to continue participating in TAP or STRAP. Dropping a class before the withdrawal deadline does not disqualify you. However, withdrawing from a class after the deadline and receiving a "W" or “WF” will make you ineligible for TAP for one semester. Grades lower than a “C” including “Ws” are not reimbursable under STRAP.
Where can I find more info about schools/curriculums of interest?

TAP: The USG TAP website provides the contact info and registration dates for all USG institutions.

STRAP: Your favorite search engine.

May I take online classes using TAP?

Online degree programs offered by USG institutions are covered by TAP. However, employees are responsible for paying tuition in excess of the normal tuition amount approved by the USG system. Non-USG, private, and for-profit institutions are not covered by TAP, but may be eligible under STRAP.

I want to return to school, but am uncertain of my options. Can you recommend schools based on the programs/interests I want to pursue?

Our office is only staffed to handle administrative aspects of tuition assistance and cannot offer advice on specific programs.
I am a TAP participant, and my account is still showing I owe the full balance. How do I get this resolved?

- Waivers are applied by the school you are attending. They do not instantly appear on your account.
- Georgia Tech students should see their TAP waivers shortly after finalizing schedules.
- If you've made adjustments to your class schedule, please allow up to 24 hours for the system to update. If your waivers have not been applied by the first day of class, please contact our office.
- Those attending other USG institutions may or may not see their waivers applied before classes have begun, or as late as after the drop/add date. Please contact your teaching institution to better understand their specific timeline.
I am a TAP participant, but was charged at the out-of-state tuition rate. How do I get this resolved?

The Office of the Registrar handles residency status. University System employees are eligible for an out-of-state waiver via application submitted to the Office of the Registrar. Any employee whose resident status is classified as out-of-state must have this resolved prior to enrollment to be eligible for in-state tuition rates.

Can I get an MBA using TAP?

Yes! However, some programs of study are considered "premium programs" and are not fully covered by TAP. TAP covers graduate programs at the standard graduate rate (currently $561/credit hour, plus mandatory fees). Certain programs, like the Georgia Tech MBA and PMASE cost significantly more than the standard graduate rate. The difference will be owed by the student. Review the most recent tuition and fees chart to anticipate any cost differential. Executive programs are not eligible for TAP.
What if I don’t know what I’m going to take, or the classes I want are full?

• Complete your application in its entirety and make your best prediction at which courses you intend to take.

• If your plans change:
  
  • **STRAP** participants must send an email to our office notifying us of the change when the change occurs, prior to submitting reimbursement documents.
  
  • **TAP participants attending Georgia Tech** do not need to notify us.
  
  • **TAP participants attending other USG institutions** must notify their teaching institution's TAP coordinator if enrolling in classes not listed on TAP application.
Candice Bovian, Work Life Specialist
HR Benefits
candice.bovian@ohr.gatech.edu
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Education Assistance
http://ohr.gatech.edu/benefits/education

USG TAP policy, TAP coordinators, application, and registration periods
http://www.usg.edu/hr/benefits/tuition_assistance_program

STRAP Application
http://ohr.gatech.edu/forms/#education

Georgia Tech Academic Calendar
www.registrar.gatech.edu

Georgia Tech Tuition and Fees
www.bursar.gatech.edu