EDUCATION ASSISTANCE PROGRAMS

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AGENDA

- Education Assistance Programs:
  - TAP – Tuition Assistance Program
  - STRAP – Staff Tuition Reimbursement Assistance Program
  - GTRI Supplemental Tuition Assistance Program
  - GTRC – Georgia Tech Research Corporation
- 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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<td>Employment Requirement</td>
<td>6 months full-time (100%), benefits-eligible by application deadline date</td>
<td>12 months full-time (100%), benefits-eligible by application deadline date</td>
</tr>
<tr>
<td>Eligible Colleges/Institutions</td>
<td>Any USG institution</td>
<td>Any accredited, private college or institution</td>
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<tr>
<td>Credit Limits</td>
<td>Up to 9 credit hours per semester</td>
<td>Up to 6 credit hours per semester</td>
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<tr>
<td>Grade Requirements</td>
<td>“C” or better</td>
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<td>Assistance Method</td>
<td>Tuition payment waiver applied up front</td>
<td>Reimbursement received after term up to the GT rate</td>
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<tr>
<td>Eligible Degree</td>
<td>Any degree except medical, dental, law, executive total cost programs</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
2. Receive student ID number from institute
3. Complete TAP application by the applicable deadline, but not more than 30 days prior to the deadline.
4. Email confirmation of receipt will be sent within one week.

[NOTE: If you haven’t heard back from the school you applied to and the deadline date is near, please continue to move forward with the TAP application process and fill one out anyway.]
TAP REGISTRATION PROCESS

• Confirmation email sent within one week.
• Approval/Denial email sent from HR within 30 days after application deadline.
• Register for classes only during TAP employee registration period or risk losing waiver.
  • See USG site – “TAP Employee Registration Dates”
• Repeat the same process for each semester in which you wish to participate.
TAP REQUEST WORKFLOW

Applications sent. Confirmation of receipt emails sent.

Eligibility Review
TAP Coordinators at each institution review grades and employment status

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

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

Important

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 account each time you register, and monitor TAP waivers for the calendar year. See TAP Tax Schedule on GT TAP website.
The Staff Tuition Reimbursement Program (STRAP) is offered by Georgia Tech.

Application Process:
1. Initiate student admission process with non-USG accredited, private institution.
2. Complete STRAP application by the applicable deadline, but not more than 30 days prior to the deadline.
3. Class start date should fall within the Georgia Tech semester that you are applying. (See STRAP Dates)
4. Class names and dates should be same on application and transcript.
5. Email confirmation of receipt will be sent within one week.

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

<table>
<thead>
<tr>
<th>SEMESTER</th>
<th>SEMESTER DATES</th>
<th>STRAP APPLICATION DEADLINE</th>
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<tbody>
<tr>
<td>GT <strong>Fall</strong> Semester</td>
<td>Mid-August – December</td>
<td>Fall STRAP Application deadline: July 15</td>
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<tr>
<td>GT <strong>Spring</strong> Semester</td>
<td>January – beg May</td>
<td>Spring STRAP Application deadline: November 15</td>
</tr>
<tr>
<td>GT <strong>Summer</strong> Semester</td>
<td>Mid May – end of July</td>
<td>Summer STRAP Application deadline: April 15</td>
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You must fill out a STRAP application based on your prospective school’s start date. If your school has a “Winter” term that 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:
  • Undergraduate: $203.00/credit hour
  • Graduate: $287.00/credit hour
• Create an expense report via Workday. Be sure to have:
  • Official/original transcript
  • Copy of paid tuition statement (must include name, term and amount paid with a zero balance)
• Full reimbursement instructions can be found on the STRAP website.
• 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 sent. Confirmation of receipt emails sent.

Eligibility and funding is reviewed.

Approval/Denial emails are sent.

Reimbursement documentation submitted via Workday (within 30 days of last course completion).

Workday Expense approved
PROGRAM EXCLUSIONS

- Medical/Veterinary degree
- Law degree
- Dental degree
- Pharmacy degree
- Continuing education courses
- Certificate courses that do not include a letter grade and credit hours
- Student fees (STRAP)
- Executive Total Cost Programs (for TAP)
  - At Georgia Tech these include Executive MBA and Executive Master’s in International Logistics & Supply Chain Strategy
  - Check with TAP Coordinators at USG institutions for specific program questions
CERTIFICATIONS AND TECHNICAL DIPLOMAS

- STRAP policy includes certifications and technical diplomas
- Must still offer **credit hours and grades** in order to get reimbursed
  - Graduate Certificates
- Some USG schools offer graduate certificates which would be covered under TAP.
  - GT has one - **Certificate of Sustainable Energy and Environmental Management (CSEEM)**
  - Check with TAP Coordinators at other USG schools to verify TAP coverage
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: Sarah Cockrell at sarah.cockrell@gtri.gatech.edu
GTRC TUITION REIMBURSEMENT

• Guidelines:
  • Full-time Research Faculty, 12 mos. Employment
  • Research faculty should first review the eligibility requirements for the TAP program: If ineligible for the TAP program, research faculty may then apply for the GTRC program.
  • Cannot be used with TAP or STRAP

• Reimbursement:
  • The current reimbursement rate is actual tuition and fees incurred up to $15,000 per calendar year.
  • 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

Summer Semester    April 15
Fall Semester       July 15
Spring Semester     November 15

Applications will be accepted up to 30 days prior to deadline

NOTE: Application deadlines and registration deadlines are different!

Application deadline dates are the dates that you must submit a TAP application to your Home Institution. They are the same every semester.

Registration dates are the dates you must register for classes. This generally happens after you’ve been approved for TAP. These dates change each semester based on when classes start.
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?

Yes.

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.

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 other USG institutions must notify their teaching institution's TAP coordinator if enrolling in classes not listed on TAP application.
TOP 3 THINGS TO REMEMBER

1. Fill out application in its entirety
2. Turn it in on time!
3. Register only during TAP registration period
CONTACT INFORMATION

Education Assistance email
eduassist@gatech.edu

Education Assistance
http://ohr.gatech.edu/benefits/education

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

Georgia Tech Academic Calendar
www.registrar.gatech.edu