FALL 2020 TUITION BENEFIT UPDATE

tuitionbenefit@gradschool.utah.edu

November 24, 2020
THANK YOU

• Thank you for all of your hard work and patience during the Fall as we roll out the changes and updates to Tuition Benefit

• Thank you for your patience as we hire a replacement for the Fellowships and Benefits Manager.
  • We hope to have the position filled by the first of December
TUITION BENEFIT UPDATE

• Phase 1
  • Ability to enter TA/GT/GR/GF allocations by department
  • Ability to enter xTBP chartfields
  • Eligibility for Medical/dental/vision insurance for all TBP students
  • New/Updated job codes
    • 9330 – now Graduate Assistant – Research Focus (GR)
    • 9417 – NEW – Grad Assistant – Teaching Focus (GT)
  • Ability to see Target TA/GT/GR/GF TBP $$ Allocation and Actual Used amounts on the Tuition Benefit Report
  • Separation on Report between TA/GT/GR/GF and RA
  • Including xTBP chartfields on the Tuition Benefit Report
  • Reduced tuition rate for Thesis Only hours

Term: 1208 Fall 2020
Academic Year: 2021 (2020 - 2021)
Year Target Amount: $31,202.00
Number of Students Entered (Year): 1.00
Actual Used: $3,762.31
Estimated Used: $4,761.00
TUITION BENEFIT REPORT - KNOWN ISSUES

- Tuition – Report includes resident and nonresident tuition
  - Phase 1 of the TB update ensured that the “Actual Used” amount at the top of the report is calculating correctly
  - We recognize the disconnect between the tuition amount on the student rows and the total “Actual Used” at the top of the online report.
  - We will be working with the TB UIT team to update the student tuition section of the report to call out the resident portion.
• RA Section –
  • Currently, the tuition RA total includes resident and nonresident tuition
  • We will be working with TB UIT to ensure the resident portion is called out.

<table>
<thead>
<tr>
<th>Totals Count</th>
<th>Anticipate Total</th>
<th>Actual Total</th>
<th>Projected Total</th>
<th>Tuition Total</th>
<th>Tuition Reduction Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>148,975</td>
<td>89,105</td>
<td>128,024</td>
<td>120,040</td>
<td>120,040</td>
</tr>
</tbody>
</table>
QUESTION - TUITION BENEFIT REPORT

• Is there a formula or a way that we can estimate the costs if we aren’t able to provide the actual used/estimated used for RAs?

• Yes, there is information available in Financial Information Library –
  • Financial Aid – TA/GA/GF/RA Information by Org
    • Provides all tuition/fees information by student
    • Use this download to verify the actual amount of tuition benefits charged to your Department/Program (“Actual Used”)
    • Remember to exclude ‘Grad Benefit NonRes Differential” item type
    • Exclude students on xTBP from download
    • Update to include all grad tuition benefit types (in progress…To be completed shortly)
• Semester Count
  • The semester count does not include current semester (Fall)
  • We’ve been working with TB UIT to change the code to count current semester
  • This update has been implemented.
TUITION BENEFIT REPORT NEW ISSUE

- Projected Support
  - It’s recently been discovered that some project support levels are not calculating correctly
  - We reached out to our UIT TB team; they are currently investigating
- Actual amount appear accurate
  - Actual amount are used when TB finalizes (1/8/2021)
TUITION BENEFIT REPORT
REQUESTS

• Please review your reports
  • Fall 2020 conditional TB should have posted

• If you notice any error messages, please investigate

• If you have a student who has changed RA/GR-TA-GF job codes during the semester, please let us know.
  • Tuition is allocated based on job codes
  • We want to ensure that neither the F&A allocation or the TA/GT/GR/GF allocation are over/under stated.
TUITION BENEFIT-ISSUES

• GF – FTE ERRORS
  • We’ve had reports of GF’s FTEs being overstated (> 0.74)
  • We worked with TB UIT on this issue
    • TB UIT worked with HR and it appears that this issue has been resolved.
    • Please review your reports.
      • If you have a GF with a questionable FTE, please reach out to your department’s payroll reporter
      • Otherwise, we will need to override those student’s Fall 2020 TB records
        • Would like to override before Fall 2020 TB is finalized on 1/8/2021
TUITION BENEFIT-ISSUES

• GF TRAINEESHIP AMOUNTS NOT PULLING INTO TUITION BENEFIT
  • We’ve been working with TB UIT and AP regarding is know issue
  • Looks like the fix won’t occur until Spring 2021
  • We’ve identified all Fall 2020 GFs and have received some test financial information from AP
    • We need to review the data
    • We will request data that included December traineeship payments
    • We would like to have all overrides entered before Fall 2020 Tuition Benefit finalizes 1/8/2021
XTBP JOURNAL ENTRY-ISSUES

- Attempted to charge tuition to xTBP chartfields in October
- Journal entry was not approved by Grants & Contracts
  - Some of the projects provided did not have a budget in the tuition budget category
    - We will be reaching out to the Departments for updated chartfields
- November
  - We will process separate the journal entries for xTBP
    - Activity chartfield
    - Project chartfield
- Spring 2021
  - We would like to process the xTBP journal entry after the census deadline (day the TB portal closes)
    - Spring 2021 Census Deadline – Monday, February 8, 2021
- Beyond Spring 2021 – chartfield validation upon entry in the TB portal
1001 FUNDS AND GR JOB CODES

We’ve received confirmation from Mark Winter and Sandy Hughes regarding the use of 1001 Funds for Research Activities.

• According to Regents Policies, fund sources should match the student's work role for payroll and xTBP.
  
  • If the primary work of the student is supporting the educational mission of the University, then the use of 1001 funds for tuition would be appropriate.
  
  • If the student's primary work is supporting the research mission of the University, then the use of other funds (2000, 2500, 5000, 6000) for tuition would be appropriate.
  
  • However, we know that funds are not always available for xTBP, and, therefore, if all you have is a fund 1001 for xTBP, please email us at tuitionbenefit@gradschool.utah.edu to document the exception.
  
  • We also know that there are GRs whose primary function is to support the educational mission of the University. Please email us at tuitionbenefit@gradschool.utah.edu to document the exception.
• The tuition benefit portal opens six weeks prior to the start of the semester
  • The portal should be opened on Wednesday, December 9th, 2020.

• Tuition Benefit minimum support levels will remain unchanged
  • 100% benefit - $7,950
  • 75% benefit - $5,962
  • 50% benefit - $3,975
SPRING SEMESTER – QUESTION ON PAYROLL DATES

- In the past, our department has had some confusion about payments over school breaks. Should payment continue or be held over the break in order to match the overall minimum support?

- Support must be received within the following timeframes:
  - Fall: August 16 – December 31, Final paycheck Jan 7
  - Spring: January 1 – May 15, Final paycheck May 22
  - Summer: May 16 – August 15, Final paycheck Aug 22
QUESTION - TBP FUNDS ALLOTMENT

• I’d like to know how our TBP funds allotment will be determined moving forward. Will future allotments be based on the initial allotment we got (plus the occasional increase so stipends will remain competitive) or will they, each year, be based on the previous year’s TBP use?

The next years allocation is based upon previous year’s use plus some additional headroom (TBD) for fluctuations. It is provided at the College level so the Dean may reallocate to departments to handle year-of-year variations in individual departments. There is a College level process for requesting changes to the Allocation based upon College needs.

• With the caps for all non-RA’s, how will we go about seeking for increases to the individual departments. Within our departments, each year it varies depending on the amount of students that accept and the amount of students that actually graduate. So there is so much fluctuations that happen, and if the cap is based off the amount of tuition benefit used from the previous year how to we combat this change.

This is the reason the yearly Allocation is sent to the College, and the Dean determines the allocation in each department based upon conversations with the Department Chairs. Departmental needs can significantly vary each year, whereas the College-wide sum is remarkably stable.

• Are the years that we don’t spend up to the cap limit allowed to carry forward that benefit difference to the next year?

No. Residual TBP allocations do not carry forward to the following academic year.
FALL 2020 – TUITION BENEFIT UTILIZATION
(BASED ON CONDITIONAL TB POSTING)

% Utilization

- School Of Medicine
- S.J. Quinney College Of Law
- Graduate School
- College of Social Work
- College of Social & Behavioral Science
- College of Science
- College of Pharmacy
- College of Nursing
- College of Mines & Earth Sciences
- College of Humanities
- College of Health
- College of Fine Arts
- College of Engineering
- College of Education
- College of Architecture & Planning
• Question –
  • It’s my understanding that students are required to register for 9 hours to be eligible for xTBP, but my Director of Graduate Studies thinks that xTBP students only need to register for 3 hours. Are xTBP students required to register for 9 credit hours?

Currently all students on TBP/xTBP must register for 9 credit hours, regardless of whether the courses are lecture, laboratory or dissertation. We are currently evaluating whether the 9 credit hours can be reduced for TBP/xTBP students on dissertation.

Full time enrollment status at the University (for purposes of visa eligibility, federal loan deferment) is a separate definition from TBP. Full time status requires either a minimum of 9 credit hours of regular classes or 3 credit hours of dissertation each semester.
QUESTION –
UPDATES TO REPORTING AND TIMELINE

- What are the updates to reporting and the timeline we might see the updates?

- Update the report to include a student’s resident and nonresident tuition
- Including RA total resident tuition amount at the bottom of the report
- Most updates won’t be implemented until next academic year
QUESTION – XTBP AND SEMESTER COUNT

- Just a clarification on whether or not it uses a student's remaining TBP semesters when I enter them into the system using the Extended Students Option

Regular TBP = 4

XTBP semester is not included in the term count above
While the College of Science was reviewing the supporting documentation on their FY21’s F&A allocation, they discovered seven RAs from other academic departments/colleges working on grants within the College of Science.

The tuition benefits from those RAs were applied to the grants within the College of Science.

If the department under the College of Science is paying the RAs, but they are a grad students in another department/colleges, shouldn’t the academic department be held be responsible for their tuition?

RA Tuition benefits really are benefits - similar to medical, vision and dental insurance subsidy. TBP remission must be charged to the same grant that the stipend is paid from. You cannot charge benefits to a grant where no effort has been expended.

In addition, the grant is generating F&A back to the College in which the grant is managed. If the tuition is charged to the College’s F&A pool, the grant has supplied the F&A funds to the College to cover the tuition.

N.B. GT/TA/GFs and some GRs work differently because they represent university support of academic departments. Tuition remission for RAs does not derive from university support - it derives 100% from external research grants.
QUESTION FROM CHAT – CONFIRM THE MINIMUM SUPPORT LEVELS

• The minimum amounts for Tuition Benefit Program for Spring 2021 will NOT increase. The amounts will remain the same amounts as of Fall 2020. Correct?

That is correct. There are no increases to compensation, including student stipends.

TBP Minimum support
100% - $7,950
75% - $5,962
50% - $3,975
I have a professor that is concerned about waiting until the end of the semester to "charge" the tuition to his grant. You mentioned that in Spring 2021 you would like to process the xTBP journal entry closer to the close of Spring TB. Beyond Spring 2021, is there a chance that the tuition would be charged (the eJournal) at the beginning of the semester instead of at the close of the semester?

To clarify, we’d like to post the journal entry within the same month that the TB portal closes for the semester.

Spring 2021 – census deadline is Monday, February 8, 2021.
QUESTION FROM CHAT – TBP CHARGES

• So do the TBP charges follow the ORG that the salary is coming out of?

TA/GT/GF/ some GRs – TBP charges follow the student's academic department

RAs and some GRs – TBP charges follow the student's effort (payroll) allocated through F&A allocation
QUESTION – TUITION CHARGES

• Students being paid in one department, but their home department is another. Who gets "charged" their tuition?

TA/GT/GF/ some GRs – TBP charges follow the student's academic department

RAs and some GRs – TBP charges follow the student’s effort (payroll) allocated through F&A allotment
QUESTION – GSHIP ELIGIBILITY

- Who is eligible and who is not eligible for subsidized insurance?

- Graduate students who are supported as RAs, TAs, GT, and GRs and receiving 100% tuition benefit, may be eligible for GSHIP.
  - 20% of the premium is paid by the student
  - 80% of the premium is paid via employer payroll expense following the chartfield used for the student’s pay.
    - Benefit funds need to be available for the 80% premium charge (i.e. RA benefit allotment, TA benefit pool, Department funding for 2000 and 6000 funds)

- Graduate Fellows (GFs) are not eligible for GSHIP as there is no employer/employee relationship.
  - There is no payroll to capture the 80% premium expense
  - Department can enroll GFs with UHCSR and EMI
    - Departments will directly receive invoices
REPORT OBSERVATION

• TB Report has duplicate lines for students on xTBP. They show up in both the RA section and the xTBP section. I do not think the spreadsheet has this problem, just the report.

• The report was designed to show all the RAs regardless if on TBP or xTBP.

• TAs on xTBP are shown only in the Extended Students section of the report.