

External Tuition Bursary Benefit for Dependants of Members of MUFA

This communication is intended for members of MUFA sent on behalf of Human Resources Services

As you may recall, the Joint Administration/Faculty Association Committee Remuneration Agreement of March 13, 2019, included the creation of a fund to be used to reimburse tuition payments for dependants and spouses of MUFA members. This email provides a summary of the new benefit and provides information on how to claim for these benefits.

Many employees are familiar with the McMaster tuition bursary benefit which is available to dependant family members of full-time employees who have completed at least three years of continuous service with the University. For fall/winter 2019/20, the maximum is \$4650 and is applied directly to the account of dependants registered with McMaster for undergraduate or graduate-level education. [See more information on the HR website.](#)

Now, the university has introduced a new, additional family tuition benefit for employees who are members of MUFA. It is for dependant children or spouses studying at a Canadian post-secondary institution other than McMaster. The application and payment procedures are different from the existing family bursary for McMaster students.

The new benefit divides a fixed pool of \$250,000 annually between students of eligible employees who have applied for the benefit so the amount will vary depending on the number of applicants. There will still be a maximum amount per student, which is expected to be less than the current bursary benefits for dependants studying at McMaster. It requires a 2-step application showing enrolment, payment, and completion of courses. The benefit is then payable in late November after the year or term is completed.

The revised Tuition Bursary Policy was approved at Board of Governors on December 12, 2019. The updated policy includes both McMaster and non-McMaster students and is posted on the [secretariat website](#). Please read the policy for specific eligibility requirements of both employees and students.

A simplified application process was created, which is described in greater detail in the Frequently Asked Questions – External Tuition Bursary attached and available on the [HR website](#). The application is a 2-step process in Mosaic with the first application deadline of March 31, 2020 for non-McMaster students studying in the 2019-20 academic year. This application deadline includes courses/programs which began after July 1, 2019.

Further details about the application process and entitlements is provided below and included in the attached Frequently Asked Questions – External Tuition Bursary. Also, updates will be posted on the <https://hr.mcmaster.ca/tuitionbenefit>

Any questions can be directed to hr.mcmaster@mcmaster.ca

Human Resources Services

Comparison of McMaster's Tuition Benefit Programs

	Employee Tuition Assistance	Dependant Tuition Bursary
Purpose:	For Employees to take courses of instruction, particularly those for undergraduate and graduate degree, diploma or certificate credit.	To assist in furthering the education of Dependants and Spouses of eligible Employees.
Benefit Payable:	Student (Employee)	Student (Dependant/Spouse of Employee)
Amount:	\$3,573.18, maximum for the 2019/2020 academic year.	Varies depending on eligibility rules and if course/program at McMaster or at other postsecondary institution

Tuition Bursary Program Highlights

	Dependant/Spouse Studying at McMaster	Dependant/Spouse Studying at other Canadian postsecondary institution
Benefit payable:	Student	Student
Application completed by:	Employee	Employee
Benefit type:	Bursary	Bursary
Payment timeline:	At start of academic year, bursary applied directly to the McMaster student account	After successful completion of academic year, bursary sent by cheque to the student's address provided on the application
Amount of bursary:	Fixed as per policy (\$4650 maximum for fall-winter 2019/2020)	Variable depending on the number of applicants (from a pool of \$250,000)
Programs/courses eligible:	Taken as required to support the completion of an undergraduate or graduate degree offered by McMaster University	Taken as required to support the completion of an undergraduate or graduate degree or college diploma program of 2-3 years offered by an accredited institution in Canada that is a degree granting university or a diploma granting community college
Are supplemental fees covered?	No reimbursement of supplemental or administrative fees	No reimbursement of supplemental or administrative fees
When does the benefit start?	Ongoing since April 1993	Benefit came into effect as of July 1, 2019. Reimbursements will be made only towards tuition payments made on or after this date.
When is the application deadline?	Within 30 days of course/program registration	With the exception of a modified application deadline in 2020, normally no later than the earliest of August 31, December 31, or April 30, following course and/or programme registration

**FREQUENTLY ASKED QUESTIONS – External to McMaster Tuition Bursary for Dependants
February 2020**

1	<p>Is my dependant and/or spouse eligible to receive this benefit?</p>	<p>Please refer to the Tuition Bursary Program for Dependants and Spouses policy for definitions and eligibility. Should you have any further questions regarding your specific eligibility, please contact: hr.mcmaster@mcmaster.ca</p>
2	<p>When is this benefit in effect?</p> <p>What is the process to apply for this benefit?</p>	<p>The benefit is applicable as of July 1, 2019. For the first year of the program we will accept applications for eligible programs taken from July 1, 2019, to August 31, 2020, inclusive. Subsequent years will cover the academic period of September 1 to August 31, annually.</p> <p>We kindly ask that employees complete and submit the application form via Mosaic employee self-service on behalf of their dependant by March 31, 2020.</p> <p>The application must include the following:</p> <ul style="list-style-type: none"> - Proof of enrolment at an Eligible Institution - Proof that the courses are required to support the dependant or spouse in their completion of an undergraduate or graduate degree, or a college diploma program (of 2 or 3 years in duration). Examples of such documentation include acceptance into the program, confirmation of enrolment, unofficial transcript from the Eligible Institution. <p>Following submission of a completed application, a confirmation of receipt and where eligible conditional pre-approval will be provided to the employee.</p>

		<p>In order to be considered in the application pool, proof of completion and proof of payment must be submitted to Human Resources Services by no later than September 30, 2020.</p> <p>Once validated, a cheque will be prepared and sent by mail to the address of the dependant/spouse as provided on the application form. A T4A will also be mailed to the same address, during the regular reporting period of February/March.</p> <p>Subsequent years of the program will follow a similar process as outlined above, however, applications may be submitted by the earliest of April 30, August 31 or December 31 annually. Proof of completion and proof of payment must be provided no later than September 30 (for payment by year-end and T4A issuance within the reporting period).</p>
3	Who is responsible for filing the application; the employee, dependant or spouse?	The employee is responsible for the completion of the application.
4	What programs/courses are eligible for this benefit?	The benefit is applicable to those courses taken as required to support the completion of an undergraduate or graduate degree offered by an accredited institution in Canada that is: a degree granting university or a diploma granting community college .
5	What if my program is not offered through an accredited institution, as listed above?	The program does not meet the eligibility requirements and does not qualify for this benefit.
6	What happens if my dependant is not successful and/or drop a course/program?	Proof of course/program completion, and proof of payment is required before benefit will be issued. Courses/program cancelled or withdrawn by the dependant are not eligible for reimbursement.
7	My dependant's course has supplemental/administrative fees, are these eligible for reimbursement?	These fees are not eligible for reimbursement.

8	Am I able to apply for this benefit for course/programs completed prior to July 1, 2019?	The benefit came into effect as of July 1, 2019. Any requests for tuition reimbursement for courses/programs commenced prior to this date will not be accepted.
9	Can I assume my dependant will receive the same amount each year?	We anticipate the usage of the pool will vary each year, as the benefit is calculated based on number of applicants which will vary from year to year.
10	If my spouse is also a McMaster employee is my child dependant able to claim the bursary benefit under each of us?	An eligible dependant of two McMaster employees is only able to claim for the tuition bursary benefit via one parent only.
11	What is the annual bursary benefit amount available to my dependant?	The benefit is calculated annually based on the number of eligible applicants within the respective tuition bursary pool. The bursary pool is \$250,000. The bursary pool will be divided equally among eligible applicants. Assuming we receive 150 eligible applicants, then the calculation is as follows: $\$250,000 / 150 = \$1,666.67$ Each dependant will receive a maximum of \$1,666.67; deemed the maximum benefit. If an applicant's tuition cost is less than the maximum benefit, the bursary benefit will not exceed the amount of tuition paid by the applicant.
12	Does this benefit cover courses/ programs taken at institutions outside of Canada?	No, this benefit only covers eligible institutions in Canada.