



**UPDATED MAY 16, 2011**

## **INSTRUCTIONS FOR COMPLETING STUDENT TUITION RECOVERY FUND FORM 2/10**

*(California Education Code §94923; Title 5, California Code of Regulations §76020-76140)*

Report all students signing enrollment agreements during the reporting period. The Student Tuition Recovery Fund (STRF) assessment rate for these students is \$2.50 per \$1,000 of institutional charges. Institutions shall collect the assessment from each student at the time it collects the first payment from or on behalf of the student at or after enrollment. The assessment shall be collected for the entire period of enrollment, regardless of whether the student pays the institutional charges in increments.

### **COMPLETE THIS FORM IN ITS ENTIRETY AS FOLLOWS:**

1. On line (A), enter the TOTAL number of ALL students enrolled during this reporting period.
2. On line (B), enter the TOTAL number of STRF eligible students included in the amount reported on line (A).

**INCLUDE:**

- California residence and students in residential programs pursuant to Title 5, Division 7.5 of the California Code of Regulations section 76120(a).

**DO NOT INCLUDE:**

- Students whose total charges are paid by a third party (such as an employer, government program or other payer) and the student has no separate agreement to repay the third party.
- Students who received a 100% refund pursuant to section 94919(d) or section 94920(b) of the California Education Code.

3. On line (C), enter to total number of students from line (B) who have made their first payment of institutional charges to the institution and STRF has been collected during **this** reporting period.
4. On line (D), enter the total number of students who signed enrollment agreements in prior reporting periods and who have made their first payment to the school and STRF has been collected in **this** reporting period.
5. On line (E), enter the total institutional charges, after ROUNDED TO THE NEAREST \$1,000, for each eligible STRF student reported on lines (C) and (D), who have made their first payment to the school and STRF has been collected in **this** reporting period.

**FOR EXAMPLE:**

- If the total institutional charge is any amount less than \$1,000, round up to \$1,000.
- If the total institutional charge is \$1,499.99 or less, round down to \$1,000.
- If the total institutional charge is \$1,500.00 or greater, round up to \$2,000.
- If you have 10 students who have all been charged \$1,600.00 for total institutional charges, each student would be rounded up to \$2,000.00. Therefore the amount you would enter here would be \$20,000.00.

6. On line (F), enter the results of your calculation of the amount written on line (E) multiplied by .0025. In using the example in item 5 above. \$20,000 multiplied by .0025 equals \$50.00. Your amount here should always end in an even dollar amount or .50.
7. **Line (G) is for the STRF credits due or adjustments. If an amount is indicated in this column, subtract from line (F) and enter the total payment due on line (H).**
8. Form shall be signed and dated by person preparing document. Provide a phone number for contact.
9. Remit the amount from line (H) along with the Student Tuition Recovery Fund (STRF) Assessment Reporting Form to the Bureau.



State and Consumer Services Agency – Arnold Schwarzenegger, Governor

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<b>Institution Name:</b>	
<b>Institution Address:</b>	
<b>Approval to Operate Application sent into the Bureau YES NO</b>	

## STUDENT TUITION RECOVERY FUND ASSESSMENT REPORTING FORM

*(California Education Code §94923; Title 5, California Code of Regulations §76120-76140)*

The Student Tuition Recovery Fund (STRF) assessment rate for enrollment agreements signed on or after February 1, 2010, is \$2.50 per \$1,000 of institutional charges **rounded to the nearest thousand dollars from each student**. Institutions shall collect the assessment from each student at the time it collects the first payment from or on behalf of the student at or after enrollment. The assessment shall be collected for the **entire period of enrollment**, regardless of whether the student pays the institutional charges in increments.

**Reporting Period: Quarter 20**      (    /    /     -     /    /    )

<b>A</b>	Enter the total number of students who signed enrollment agreements during the reporting period indicated above.	
<b>B</b>	Enter the total number of those students on line (A) who are eligible for STRF.	
<b>C</b>	Enter the total number of students from line (B) who have made their first payment and STRF has been collected during <b>this</b> reporting period.	
<b>D</b>	Enter the total number of students who signed enrollment agreements in <b>prior</b> reporting periods and who have made their first payment and STRF has been collected during <b>this</b> reporting period.	
<b>E</b>	Enter the total institutional charges ( <b>after rounding each student's institutional charges to the nearest \$1,000</b> ) for all eligible STRF students from on line (C) and (D).	\$
<b>F</b>	Calculate STRF assessment due. <b>Multiply the amount on line (E) by .0025.</b> Write the result on this line.	\$
<b>G</b>	Bureau use only.	
<b>H</b>	<b>Total Payment Due from line (F).</b>	\$

**“I declare under penalty of perjury under the laws of the State of California that the information herein reported is true and correct”.**

Signature of preparer: \_\_\_\_\_ Date \_\_\_\_\_

Printed Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_