Benefits – Processing Education Requests

Education Benefits

Employees can request education benefits using central or departmental funds via the Create Request process in Workday. Separate requests must be entered if requesting funds from different funding sources. Requests from central funds route to the Benefits Partner; requests for departmental funds route to the Manager, then to the Benefits Partner for approval.

The Employee Request Process

1. From the Workday landing page, choose the Requests application.
2. Select Create Request.
3. Choose Educational Benefits as the request type.
4. Describe the request.
5. Choose the appropriate funding type.
6. Select degree or non-degree program.
7. Select what best describes the course.
   - For Non-Degree Only - Select what best describes the course you are taking
     - Exam Preparatory Course
     - GED
     - Non-Degree College Course
     - Other - Submit Details in the Comment Box
     - Private Lesson (Work Related)
     - Professional Certification - CEU
     - Professional Certification non-CEU
     - Trade/Technical/Vocational Licensure
8. Enter the name of the institution and course.
   Name of Educational Institution and Course Name. (Required)
   Workday HCM Fundamentals
9. Enter the degree or certification information.
   Name of the Degree, CEU, Certification, License, or Trade Upon Completion
   Certificate
10. Enter the Start and End Date of the course.
    Start Date for the course, license, or certification. (Required)
    11 / 05 / 2018
    End Date for the course, license, or certification. (Required)
    11 / 09 / 2018
11. Enter the degree completion date if applicable.
    If completing a degree, date you expect to attain your degree.
    MM / DD / YYYY

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12. Enter the course delivery method.

- Conference
- Exam/Exam Prep
- In Classroom
- Independent Study
- Online
- Private Tutor
- Trade Apprenticeship

13. Enter the total amount owed to the provider and the amount being requested.

- Tuition or total cost I will owe the educational provider. (Required)
  - 2000

- Funding Amount Requested (Required)
  - 2000

14. Enter any comments and attach any documents and click Submit.

The Benefit Partner Process

1. Open the To-Do in the Inbox

- Request Process: Educational Benefits
  - 9 minute(s) ago

2. Review the details of the request.

3. Open a new window by right-clicking the cloud and choosing See in New Tab.

4. Go to the employee’s profile by searching for the employee’s name in the Search Bar.

5. Click Actions, Compensation, View Compensation History and click the One-Time Payments tab if it exists.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Benefit - Departmental Funds</td>
<td>2,000.00</td>
</tr>
<tr>
<td>Education Benefit - Central Funds - Professional</td>
<td>2,000.00</td>
</tr>
<tr>
<td>Reward &amp; Recognition Bonus - UStaff</td>
<td>1,500.00</td>
</tr>
</tbody>
</table>

This screen will showing any paid or pending requests for educational assistance.

6. Return to the Inbox and select the appropriate response to the request.

- Approve
- Send Back
- Deny

7. If Approve is selected, the Benefits Partner is prompted with a Request One Time Payment To-do. Click the To Do button.

8. Click the Request One-Time Payment button

9. Enter the Effective Date and the Employee name.

  - Effective Date: 11/05/2018
  - Employee: Betty Benefits, 100 (BB-100)
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10. Enter the Reason and click the

![Reason Input]

11. Click the Add button and select the appropriate One-Time Payment plan.

![One-Time Payment]

12. Enter the requested amount and click the

![Amount Input]

13. Click Submit to finalize the payment.

14. Return to the Inbox and click Submit to finalize the Request One Time Payment To-Do.

Reports

- Educational Benefit Annual Limit – Calendar Year
  - Run by employee to see the limits and what has been paid to date
- NOTE: THERE IS SUPPOSED TO BE A REPORT THAT THE EE RECEIVES ONE WEEK AFTER THE END OF THE CLASS REMINDING THEM TO SUBMIT DOCUMENTATION