

EDUCATIONAL ASSISTANCE JOB AID

How to Approve an Educational Assistance Expense Report

Overview

To recruit, develop, engage, and retain top quality workforce we must invest in the ongoing career and educational goals of our team members. The Medical Center provides centrally funded educational assistance for academic coursework and professional certification. It is recommended that educational assistance be an integrated part of an approved professional development plan designed by the team member and respective manager. Eligible team members must complete an Educational Assistance Expense Report via the PeopleSoft Finance Expense Reimbursement system. Department supervisors/managers are responsible for initial approval of the Expense Report in the system. Please refer to the [Medical Center Human Resources Policy No. 301](#) for eligibility, criteria and guidelines, and procedures regarding educational assistance.

Purpose

The purpose of this document is to provide step-by-step instructions for managers to approve an Expense Report for Educational Assistance in the PeopleSoft Finance Expense Reimbursement system.

Contents

<i>Overview</i>	1
<i>Purpose</i>	1
<i>Manager Approval</i>	2
<i>Instructions</i>	2
<i>Part I: Navigate to the Expense Report</i>	2
<i>Part II: Review Expense Report Summary</i>	4
<i>Part III: Review Expense Details for EDU ASST- Academic Course</i>	6

Manager Approval

Instructions

Follow the step-by-step instructions listed below to access, review, and approve/hold/deny/send back a team member's Educational Assistance Expense Report request in the PeopleSoft Finance Expense Reimbursement system.

Part I: Navigate to the Expense Report

There are two ways you can navigate to an Educational Assistance Expense Report needing your approval: **A. From Your Email** and **B. Directly From PeopleSoft Finance in the PeopleSoft Finance Expense Reimbursement system**.

A. FROM YOUR EMAIL

1. Once a team member submits an Educational Assistance Expense Report, you will receive an email via Outlook with the Subject "Expense report _____ (Expense Report number) for _____ (Team member's name) requires your attention"
2. From the email, click on the URL link under the statement "You can navigate directly to the approval page by clicking the link below:" to navigate to the sign-in screen
3. Enter your UVA HS credentials and password into the applicable fields and click on the **Sign In** button



4. Once you sign-in to the system, your **Worklist** will be the first screen you see
5. Please refer to **Part II: Review Expense Report Summary** for the next steps

B. DIRECTLY FROM PEOPLESOFT FINANCE

1. Click on the PeopleSoft Finance Expense Reimbursement link [here](#) or type the following URL into the Internet Explorer URL bar: <https://uvfnwb.hscs.virginia.edu:7014/psp/ps/>

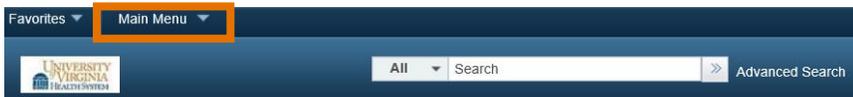
2. Enter your UVA HS credentials and password into the applicable fields and click on the **Sign In** button



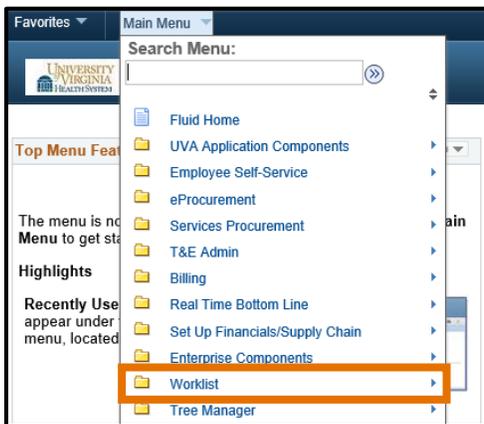
3. On the PeopleSoft Finance Expense Reimbursement homepage, click on the **Classic Home** button



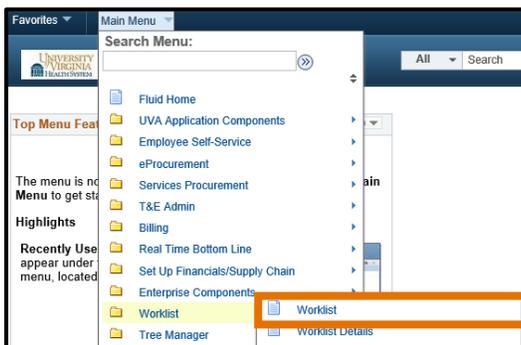
4. Click on the **Main Menu** drop-down in the menu bar in the upper left corner of the screen



5. Click on the **Worklist** folder



6. Click on the **Worklist** document



7. Click on the corresponding **Link** for the Worklist Item to review the Expense Report

Worklist

Worklist for TESTER3: Manager Joyeux

Detail View Worklist Filters [dropdown] Feed [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link		
Happy Testing	09/21/2017	Approval Routing	Approval Workflow	2-Medium	ERApproval_133354_HSC_2017-07-02_N_0_SHEET_ID:0000011452	Mark Worked	Reassign
Happy Testing	09/27/2017	Approval Routing	Approval Workflow	2-Medium	ERApproval_133424_HSC_2017-07-02_N_0_SHEET_ID:0000011459	Mark Worked	Reassign
Happy Testing	09/27/2017	Approval Routing	Approval Workflow	2-Medium	ERApproval_133434_HSC_2017-07-02_N_0_SHEET_ID:0000011460	Mark Worked	Reassign

Part II: Review Expense Report Summary

8. Review the **Report Description** (Course Name) and **Business Purpose** (Educational Assistance)

Approve Expense Report

Expense Report Summary

Happy Testing User Defaults

General Information

Report Description Course Name Goes Here	Report ID 0000011459
Business Purpose Educational Assistance	Reference
Report Status Submitted for Approval	Employee Base Office
	Created On 09/27/2017 By TESTER2
	Updated on 09/27/2017 3:36:21PM By TESTER2
	Attachments (2) Notes

*Accounting Date: 09/27/2017 [calendar icon]

Accounting Template: EXPENSES [search icon]

9. Click on the **Attachments** link

Approve Expense Report

Expense Report Summary

Happy Testing User Defaults

General Information

Report Description Course Name Goes Here	Report ID 0000011459
Business Purpose Educational Assistance	Reference
Report Status Submitted for Approval	Employee Base Office
	Created On 09/27/2017 By TESTER2
	Updated on 09/27/2017 3:36:21PM By TESTER2
	Attachments (2) Notes

*Accounting Date: 09/27/2017 [calendar icon]

Accounting Template: EXPENSES [search icon]

10. Click on the name of the File under **File Name** to download the attachment (Please note, clicking on the attachment may not automatically open the document. You may be prompted to click on the document at the bottom of the screen or you may find the document open in another window based on your browser options. As a reminder, Internet Explorer is the recommended browser.)

Expense Report Attachments

Report ID 0000011459

Help

Details Personalize | Find | View All | [dropdown] [dropdown] First 1-2 of 2 Last

File Name	Description	User	Name	Date/Time Stamp
Exam_Fees.pdf		TESTER2	Happy Testing	09/27/2017 3:36:21PM
Application_Fees.pdf		TESTER2	Happy Testing	09/27/2017 3:36:21PM

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

OK Cancel

11. Initially review the Attachment(s) for (Refer to [Policy No. 301](#) for specific information):
- Name of academic course or professional certification
 - Eligibility of academic course or professional certification
 - Proper documentation for total amount of Educational Assistance being requested
 - If applicable, successful completion requirements
12. If applicable, review any **Notes** the team member entered

Approve Expense Report

Expense Report Summary

Happy Testing User Defaults

General Information

Report Description Course Name Goes Here	Report ID 0000011459	
Business Purpose Educational Assistance	Reference	Employee Base Office
Report Status Submitted for Approval	Created On 09/27/2017	By TESTER2
	Updated on 09/27/2017 3:36:21PM	By TESTER2
*Accounting Date 09/27/2017	Attachments (2)	Notes
Accounting Template EXPENSES		

13. After you have reviewed the attachments and any applicable notes, click on the **a. EDU ASST- Academic course** or **b. EDU ASST-Prof Certification** link listed under **Expense Type** (You must click on this link to review the Form before approval)

a. EDU ASST- Academic course

You can deny individual expenses and still approve or send back the overall report.

Expense Line Items Personalize | Find | |

Expense Type	Date	Reimburse Amt	Currency	Receipt Verified	Receipt Required	Approve
EDU ASST- Academic course	09/27/2017	2,000.00	USD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

b. EDU ASST-Prof Certification

Expense Line Items Personalize | Find | |

Expense Type	Date	Reimburse Amt	Currency	Receipt Verified	Receipt Required	Approve
EDU ASST-Prof Certification	09/21/2017	123.00	USD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Part III: Review Expense Details for EDU ASST- Academic Course

THE MANAGER MUST REVIEW THE EDUCATIONAL ASSISTANCE FORM BEFORE APPROVAL

14. Review the **Educational Assistance Form** for a. EDU ASST- Academic course or b. Professional Certification

a. EDU ASST- Academic course

Educational Assistance Form Find | View All First 1 of 1 Last

*Course Title: Course Title
*Course #: COURSE NUMBER
*Start Date: 05/01/2017
*End Date: 06/02/2017
*School Name: Name of School
Address:
City:
State:
Postal Code:
*Credit Hours: 003
*Tuition: 1500.000
Fees (Eligible): 500.00
Course is part of a degree program:
*Degree Program: Undergraduate
*Degree Field: Business
*Anticipated Graduation Date: 05/18/2018

This request is for an academic credit course or a professional certification that is of value/benefit to the Medical Center.
 Employee has not received formal performance improvement counseling within the last 6 months.

If the requested amount exceeds the annual maximum for that type of expense, what is the maximum departmental funding approved to cover eligible expenses above that limit? (Note: Total educational assistance funding from all sources may not exceed \$5,250 per calendar year)
\$ _____

Department code _____

HR Information
Empl ID 45010
Last Hire Date 09/12/2016
Position Number 2138330
Job Title RN Clinician 1
Empl Class Health Care Professionals
Annual Salary \$ 50 K or less Y

b. EDU ASST- Professional Certification

Educational Assistance Form Find | View All First 1 of 1 Last

*Professional Certification Type: Pro. Certification Initial
*Professional Certification Title: Professional Certification Title
*Certification Abbreviation: PROF CERT ABBR
*Certification body: Certifying Institution
Fees (Eligible): 375.00

This request is for an academic credit course or a professional certification that is of value/benefit to the Medical Center.

If the requested amount exceeds the annual maximum for that type of expense, what is the maximum departmental funding approved to cover eligible expenses above that limit? (Note: Total educational assistance funding from all sources may not exceed \$5,250 per calendar year)
\$ _____

Department code _____

HR Information
Empl ID 45010
Last Hire Date 09/12/2016
Position Number 2138330
Job Title RN Clinician 1
Empl Class Health Care Professionals
Annual Salary \$ 50 K or less Y

15. Select the **“This request is for an academic credit course or professional certification that is of value/benefit to the Medical Center”** box. If you do not feel this statement is accurate but you still wish to approve the expense, select the box and provide explanation in the comments section (*Refer to step 19*)

This request is for an academic credit course or a professional certification that is of value/benefit to the Medical Center.

16. Select the **“Employee has not received formal performance improvement counseling within the last 6 months.”** Box. If you do not feel this statement is accurate but you still wish to approve the expense, select the box and provide explanation in the comments section (*Refer to step 19*) (*This box will only appear for the EDU ASST-Academic course. This box will not appear for EDU ASST-Professional Certification.*)

Employee has not received formal performance improvement counseling within the last 6 months.

17. If the department wishes to contribute additional funds over the \$2,000 maximum for Educational Assistance, enter the amount in the **\$** field and enter or look up the **Department code** to be charged (*Total educational assistance funding from all sources may not exceed \$5,250 per calendar year*)

If the requested amount exceeds the annual maximum for that type of expense, what is the maximum departmental funding approved to cover eligible expenses above that limit? (Note: Total educational assistance funding from all sources may not exceed \$5,250 per calendar year)

\$

Department code 

18. Once you are finished reviewing the expense details, click on the **Return to Expense Report** link in the bottom, lower left corner of the screen (*At this time, the Approve Expense box will be automatically checked. Do not change this box at this time.*)

Approve Expense

[Return to Expense Report](#)

19. Type any comments in the **Comments** section (*If you choose the Send Back or Deny options you are required to have comments*)

▼ **Comments**

20. Click one of the five options:



- a. **Approve:** This is the first level of approval for the report. The report will then be sent to HR for final approval.
- b. **Send Back:** If you have questions or are requesting modifications from the team member, this report will be sent back to the team member for revisions (*All transactions must have a comment included when they are sent back for revisions. Enter comments and click the Send Back for Revision button again*)
- c. **Hold:** This report will be saved and held for later. You can approve, deny, or send back this report at a later time.
- d. **Deny:** The entire report will be denied. None of the expenses will be reimbursed (*All transactions must have a comment included when they are denied. Enter comments and click the Deny button*)
- e. **Save Changes:** Save any changes you make to the Expense Report

21. Click the **OK** button



Congratulations!

You have completed your review the initial approval, denial, send back, or hold of an Educational Assistance Expense Report. If you approved the Expense Report, the Report will be sent to Human Resources for final approval. Following final approval, reimbursements will be directly deposited in the team member's account.