

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.

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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

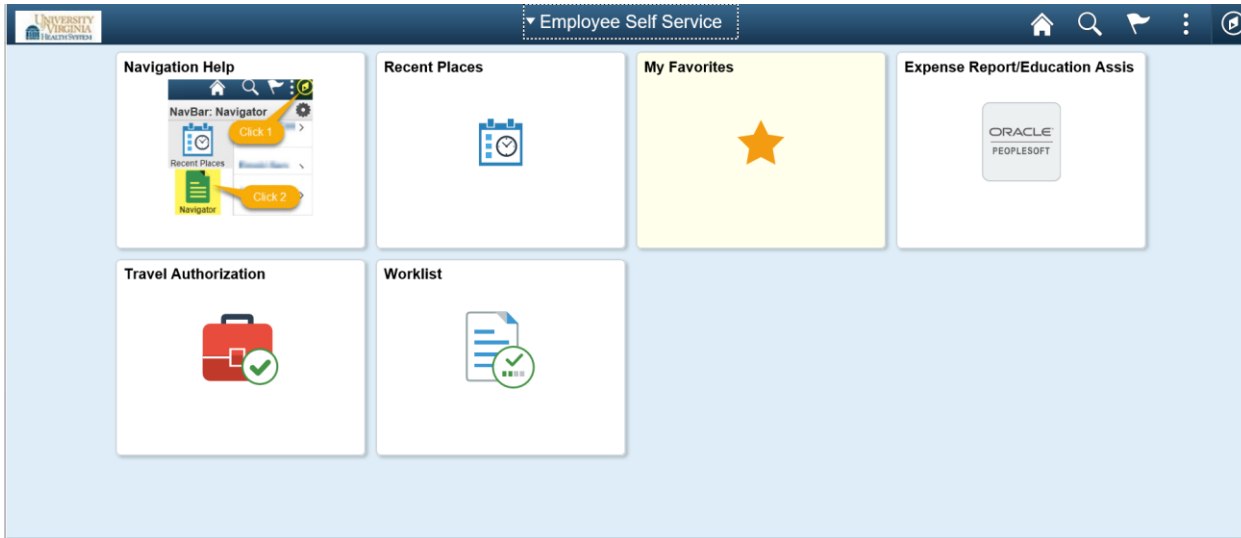
1. Click on the PeopleSoft Finance Expense Reimbursement link [here](https://uvfnwb.hscs.virginia.edu:7014/psp/ps/) or type the following URL into the Internet Explorer URL bar: <https://uvfnwb.hscs.virginia.edu:7014/psp/ps/>

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

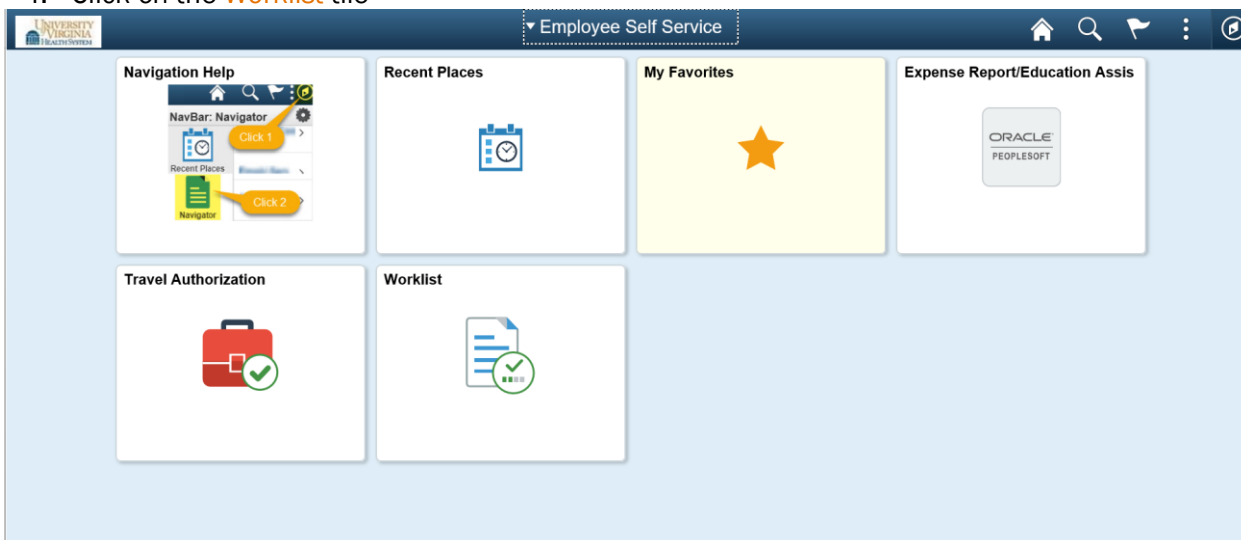


The image shows the sign-in page for the University of Virginia Health System's PeopleSoft Financials and Supply Chain Management system. At the top is the UVA Health System logo. Below it, the text "PeopleSoft Financials and Supply Chain Management" is displayed. The main section is titled "Sign In" and contains two input fields: "User ID" and "Password". A green "Sign In" button is located below the password field. At the bottom, there is a checkbox labeled "Enable Accessibility Mode".

3. You'll arrive on the PeopleSoft Finance Expense Reimbursement homepage.



4. Click on the **Worklist** tile



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

Worklist

Worklist for TESTER3: Manager Joyeux

Detail View

Worklist Filters

Feed

Worklist Items

Personalize | Find | View All |

First 1-3 of 3 Last

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-BDC-BA.1.A	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-BDC-BA.1.A	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-BDC-BA.1.A	Mark Worked	Reassign

Part II: Review Expense Report Summary

- 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

Accounting Template

EXPENSES

- 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

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TESTER2

Attachments (2)

Notes

*Accounting Date

09/27/2017

Accounting Template

EXPENSES

- 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				
<div> <div>Details</div> <div> Personalize Find View All </div> </div>				
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.				
<div> <div>OK</div> <div>Cancel</div> </div>				

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

Approve Expense Report

Expense Report Summary

Happy Testing User Defaults

General Information

<p>Report Description Course Name Goes Here</p> <p>Business Purpose Educational Assistance</p> <p>Report Status Submitted for Approval</p> <p>*Accounting Date 09/27/2017 </p> <p>Accounting Template EXPENSES </p>	<p>Report ID 0000011459</p> <p>Reference</p> <p>Created On 09/27/2017</p> <p>Updated on 09/27/2017 3:36:21PM</p> <p>Attachments (2)</p> <p>Employee Base Office</p> <p>By TESTER2</p> <p>By TESTER2</p> <p>Notes</p>
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11. 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

12. 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
<div><p>*Course Title: Course Title</p><p>*Course #: COURSE NUMBER</p><p>*Start Date: 05/01/2017</p><p>*End Date: 06/02/2017</p><p>*School Name: Name of School</p><p>Address:</p><p>City:</p><p>State:</p><p>Postal Code:</p><p>*Credit Hours: 003</p><p>*Tuition: 1500.000</p><p>Fees (Eligible): 500.00</p><p>Course is part of a degree program: <input checked="" type="checkbox"/></p><p>*Degree Program: Undergraduate</p><p>*Degree Field: Business</p><p>*Anticipated Graduation Date: 05/18/2018</p></div>	<div><p>HR Information</p><p>Empl ID 45010</p><p>Last Hire Date 09/12/2016</p><p>Position Number 2138330</p><p>Job Title RN Clinician 1</p><p>Empl Class Health Care Professionals</p><p>Annual Salary \$ 50 K or less Y</p></div>	
<div><p><input type="checkbox"/> This request is for an academic credit course or a professional certification that is of value/benefit to the Medical Center.</p><p><input type="checkbox"/> Employee has not received formal performance improvement counseling within the last 6 months.</p><p>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)</p><p>\$ <input type="text"/></p><p>Department code <input type="text"/></p></div>		

b. EDU ASST- Professional Certification

Educational Assistance Form		Find View All First 1 of 1 Last
<div><p>*Professional Certification Type: Pro. Certification Initial</p><p>*Professional Certification Title: Professional Certification Title</p><p>*Certification Abbreviation: PROF CERT ABBR</p><p>*Certification body: Certifying Institution</p><p>Fees (Eligible): 375.00</p></div>	<div><p>HR Information</p><p>Empl ID 45010</p><p>Last Hire Date 09/12/2016</p><p>Position Number 2138330</p><p>Job Title RN Clinician 1</p><p>Empl Class Health Care Professionals</p><p>Annual Salary \$ 50 K or less Y</p></div>	
<div><p><input type="checkbox"/> This request is for an academic credit course or a professional certification that is of value/benefit to the Medical Center.</p><p>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)</p><p>\$ <input type="text"/></p><p>Department code <input type="text"/></p></div>		

13. 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.


14. 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.

15. 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 

16. 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](#) [Return to Expense Report](#)

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

▼ Comments

18. Click one of the five options:

Approve	Send Back	Hold	Deny	Save Changes
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- 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

19. Click the **OK** button

Save Confirmation

Approve Expense Report

Submit Confirmation

Happy Testing

Report ID 0000011459

Expense Report Totals					
Employee Expenses (1 Line)	2,000.00	USD	Due Employee	2,000.00	USD
Non-Reimbursable Expenses	0.00	USD	Due Supplier	0.00	USD
Prepaid Expenses	0.00	USD	Definition of Totals		
Employee Credits	0.00	USD			
Supplier Credits	0.00	USD			
Cash Advances Applied	0.00	USD			

☒ This report will be approved.

OK

Cancel

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.