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 on how to navigate, create, and submit an Expense Report for Educational Assistance in the PeopleSoft Finance Expense Reimbursement system.

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Eligible Course

Eligible courses must meet one of the following criteria:

◊ Academic credit course leading to an Associate’s, Bachelor’s, Master’s, or Doctoral degree
◊ Review course for a Professional Certification that is of value/benefit to the Medical Center as determined by the department primarily responsible for managing the practitioner
◊ English as a Second Language (ESL), literacy, and related classes
◊ Lean or other related classes

Instructions

Follow the steps listed below to request advance tuition and/or reimbursement for an eligible course.

Part I: Navigate to the Expense Report

1. Click on the PeopleSoft Finance Expense Reimbursement link [here](https://uvfnwb.hscs.virginia.edu:7014/psp/ps/) or copy and paste 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 **Employee Self-Service** folder

![Employee Self-Service folder]

6. Click on the **Travel and Expenses** folder

![Travel and Expenses folder]

7. Click on the **Expense Reports** folder

![Expense Reports folder]

8. Click on the **Create/Modify** link

![Create/Modify link]

9. Click on the **Add** button under your **Empl ID** *(Your Empl ID will auto-populate since you are logged into your personal account)*

![Add button]

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**Part II: Create Expense Report**

**REQUIRED FIELDS**

10. Click on the *Business Purpose* drop-down menu and select *Educational Assistance*

11. Enter the name of the course for the *Report Description*

12. Click on the *Attachments* link

13. Click on the *Add Attachment* button

14. Click on the *Browse...* button
15. Locate and select your attachments (e.g., course description, tuition, fees, and/or copy of your transcript indicating your grades) and click on the Open button.

16. Click on the Upload button.

17. Repeat steps 13 through 16 until all attachments have been uploaded, then click on the OK button.
**Part III: Expenses**

**REQUIRED FIELDS**

18. Click on the *Date* icon and select the **Current Date** option located at the bottom of the calendar *(The Date format must be MM/DD/YYYY)*

19. Click on the *Expense Type* drop-down menu and select **EDU ASST- Academic course** *(This will trigger the Educational Assistance Form to appear)*

20. Enter the total amount of educational assistance requested under *Amount* *(If the total amount is under the annual allowed amount, the Amount must equal the sum of the Tuition and Fees (Eligible) fields under the Educational Assistance Form. If the total amount is over the allotted amount, enter in the allotted dollar figure as the amount being requested. This number should not exceed the eligible educational assistance amount for the calendar year, including any previous requests)*

The following fields are required but you should not change from the default selection:

a. Do not change the *Payment Type* *(The Payment Type is Paid by Employee)*
b. Do not change the *Billing Type* *(The Billing Type is Internal)*
c. Do not change the *Exchange Rate* *(The Exchange Rate is 1.00000000)*
If you are requesting advance tuition or reimbursement for more than one course, click on the plus sign (+) next to the magnifying glass. An additional line for the next course will appear below the Educational Assistance Form (at the bottom of the page)

![Educational Assistance Form](image)

Repeat steps 18 through 20 to enter information for the additional course

**Part IV: Educational Assistance Form**

**REQUIRED FIELDS**

21. Enter the full name of the course under *Course Title*

22. Enter the number of the course under *Course #*

23. Click on the *Start Date* icon and select the date the course started

24. Click on the *End Date* icon and select the date the course ended

25. Enter the name of the school under *School Name*
26. Enter the street or P.O. address of the school under **Address**

27. Enter the city the school is located in under **City**

28. Enter the state the school is located in under **State**

29. Enter the postal code of the school under **Postal Code**

30. Enter the total credit hours for the course under *Credit Hours* (*If the course is not credit bearing, enter 0*)

31. Enter the total tuition amount under **Tuition** (*As a reminder, the sum of the Tuition and Fees must equal the number in the Amount field under Expenses*)

32. Enter the total amount of eligible fees in **Fees (Eligible)** (*As a reminder, the sum of the Tuition and Fees must equal the number in the Amount field under Expenses*)

33. If applicable, select the **Course is part of a degree program** box (*The screen below will appear when you select the box*)

34. If the Course is part of a degree program box is selected, click on the *Degree Program* drop-down menu and select either **Graduate** or **Undergraduate**

35. Enter the name of the degree program in the *Degree Field* (*e.g., Nursing, Pharmacy, Business*)

36. Click on the *Anticipated Graduate Date* icon and select the date you anticipate graduating

37. Click on the “Are you eligible for advance tuition payment (annual base salary of $50,000 or less and two or more years of continuous employment, or enrolling in a for-credit course at UVA)?” * drop-down menu and select either **YES** or **NO**

38. Click on the “Are you currently employed in a ‘hard to fill’ position in the Medical Center, or will this degree program prepare you for employment in one of these job classifications?” * drop-down menu and select either **YES** or **NO** (*Click on the “hard to fill” link to view a list of hard to fill job classifications in the Medical Center*)

39. Select the “I acknowledge that I have read the Educational Assistance policy #301 and this request is in compliance with the provisions of that policy. I authorize the Medical Center to deduct through payroll withholding any amounts owing and due to the Medical Center under the terms of the Educational Assistance Policy #301.” Box

Please note, if you are requesting advance tuition or reimbursement for more than one course, you must repeat steps 21 through 39 for each course request
Part V: Summary and Submit

40. Click on the **Summary and Submit** link in the upper right side of the Create Expense Report screen *(Please note, if there are any required fields missing information or errors, you will receive an error message requiring you to complete or modify the fields highlighted in red before moving forward)*

![Create Expense Report](image1)

41. If you would like to enter a note for your manager, click on the **Notes** link at this time

![Create Expense Report](image2)

a. Enter any notes into the notes box and click on the **Add Notes** button. Once you are done, click on the **OK** button.

![Create Expense Report](image3)

42. Select the **“By checking this box, I certify the expenses are accurate and comply with expense policy.”** box *(The Submit Expense Report button will not appear until you have selected this box)*

![Create Expense Report](image4)
43. Click on the **Submit Expense Report** button if you are ready to submit your request *(If you need to go back to the Expense Report, click on the Expense Details link next to the Save for Later link)*

![Create Expense Report](image)

44. Click on the **OK** button to submit confirmation of your request

![Expense Report Submit Confirm](image)

a. If you receive an error message “Attachment Required,” click on the **OK** button and click on the **Attachments** link *(Refer to steps 13 through 16 above for additional guidance)*, then repeat steps 45 and 46

![Expense Report Submit Confirm](image)

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**Congratulations!**

You have completed all of the necessary steps to submit an Educational Assistance Expense Report for an Academic Course. Next, your direct supervisor/manager will review your request. Based on their review, they will either Approve, Send Back, Hold, or Deny your request. If your direct supervisor/manager decides to Send Back or Deny your request, they are required to provide an explanation. If your direct supervisor decides to Send Back the request, the Expense Report will be sent back to you via email and will be Pending until you make the required modifications.
Eligible Professional Certification

A professional certification that is of value/benefit to the Medical Center, as determined by the department manager.

Instructions

Follow the steps listed below within 30 days after successful completion of an eligible professional certification.

Part I: Navigate to the Expense Report

1. Click on the PeopleSoft Finance Expense Reimbursement link here or copy and paste 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 **Employee Self-Service** folder

6. Click on the **Travel and Expenses** folder

7. Click on the **Expense Reports** folder

8. Click on the **Create/Modify** link

9. Click on the **Add** button under your Empl ID *(Your Empl ID will auto-populate since you are logged into your personal account)*
Part II: Create Expense Report

*REQUIRED FIELDS

10. Click on the **Business Purpose** drop-down menu and select *Educational Assistance*

11. Enter the name of the professional certification for the **Report Description**

12. Click on the **Attachments** link

13. Click on the **Add Attachment** button
14. Click on the **Browse...** button

![File Attachment](image)

15. Locate and select your attachments (e.g., application and/or exam fees) and click on the **Open** button

![Choose File to Upload](image)

16. Click on the **Upload** button

![File Attachment](image)

17. Repeat steps 13 through 16 until all attachments have been uploaded, then click on the **OK** button

![Expense Report Attachments](image)
Part III: Expenses

*REQUIRED FIELDS

18. Click on the *Date icon and select the Current Date option located at the bottom of the calendar (The Date format must be MM/DD/YYYY)

19. Click on the *Expense Type drop-down menu and select EDU ASST-Prof Certification (This will trigger the Educational Assistance Form to appear)

20. Enter the total amount of educational assistance requested under *Amount (The Amount must equal the sum of the Tuition and Fees (Eligible) fields under the Educational Assistance Form. This number should not exceed your eligible educational assistance amount for the calendar year, including any previous requests)

The following fields are required but you should not change from the default selection:
  a. Do not change the *Payment Type (The Payment Type is Paid by Employee)
  b. Do not change the *Billing Type (The Billing Type is Internal)
  c. Do not change the *Exchange Rate (The Exchange Rate is 1.00000000)
**Part IV: Educational Assistance Form**

*REQUIRED FIELDS*

![Educational Assistance Form](image)

21. Click on the **Professional Certification Type** drop-down menu

22. Select either **Pro Certification Renewal** or **Pro Certification Initial**

23. Enter the full name of the certification in **Professional Certification Title**

24. Enter the abbreviated name of the certification in **Certification Abbreviation**

25. Enter the name of the certifying institution (e.g., American Nurses Credentialing Center, Pediatric Nursing Certification Board, Medical-Surgical Nursing Certification Board) in the **Certifying Institution**

26. Enter the amount of eligible fees in **Fees (Eligible)** (Important note - the Fees must equal the same number your entered in the Amount field under Expenses which may not exceed $375 per calendar year)

27. Select the "I acknowledge that I have read the Educational Assistance policy #301 and this request is in compliance with the provisions of that policy. I authorize the Medical Center to deduct through payroll withholding any amounts owing and due to the Medical Center under the terms of the Educational Assistance Policy #301." box

**Part V: Summary and Submit**

28. Click on the **Summary and Submit** link in the upper right side of the Create Expense Report screen (Please note, if there are any required fields missing information or errors, you will receive an error message requiring you to complete or modify the fields highlighted in red before moving forward)
29. If you would like to enter a note for your manager, click on the Notes link

![Notes link]

a. Enter in any notes into the notes box and click on the Add Notes button. Once you are done, click on the OK button.

![Notes input]

30. Select the “By checking this box, I certify the expenses are accurate and comply with expense policy.” box (The Submit Expense Report button will not appear until you have marked this box)

![Certification box]

31. Click on the Submit Expense Report button if you are ready to submit your request (If you need to go back to the Expense Report, click on the Expense Details link next to the Save for Later link)

![Submit Expense Report button]
32. Click on the OK button to submit confirmation of your request

![Expense Report Submit Confirm]

<table>
<thead>
<tr>
<th>Totals</th>
<th>View Printable Version</th>
<th>View Analytics</th>
<th>Notes</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Expenses (1 Line)</td>
<td>375.00 USD</td>
<td>Non-Reimbursable Expenses</td>
<td>0.00 USD</td>
<td>Employee Credits</td>
</tr>
<tr>
<td>Cash Advances Applied</td>
<td>0.00 USD</td>
<td>Prepaid Expenses</td>
<td>0.00 USD</td>
<td>Supplier Credits</td>
</tr>
<tr>
<td><strong>Amount Due to Employee</strong></td>
<td><strong>375.00 USD</strong></td>
<td><strong>Amount Due to Supplier</strong></td>
<td><strong>0.00 USD</strong></td>
<td></td>
</tr>
</tbody>
</table>

32a. If you receive an error message “Attachment Required,” click on the OK button and click on the Attachments link (Refer to steps 13 through 17 above for additional guidance), then repeat steps 30 and 31

![Expense Report Submit Confirm]

**Congratulations!**

You have completed all of the necessary steps to submit an Educational Assistance Expense Report for a Professional Certification. Next, your direct supervisor/manager will review your request. Based on their review, they will either Approve, Send Back, Hold, or Deny your request. If your direct supervisor/manager decides to Send Back or Deny your request, they are required to provide an explanation. If your direct supervisor decides to Send Back the request, the Expense Report will be sent back to you via email and will be Pending until you make the required modifications.
View Expense Reports

To view the status or history of your Expense Reports, follow the steps listed below.

1. Click on the PeopleSoft Finance Expense Reimbursement link here or copy and paste 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 Employee Self-Service folder

6. Click on the Travel and Expenses folder
7. Click on the Expense Reports folder

8. Click on the View link

9. Click on the Search button to view a comprehensive list of your Expense Reports

10. A list of Expense Reports will appear under Search Results