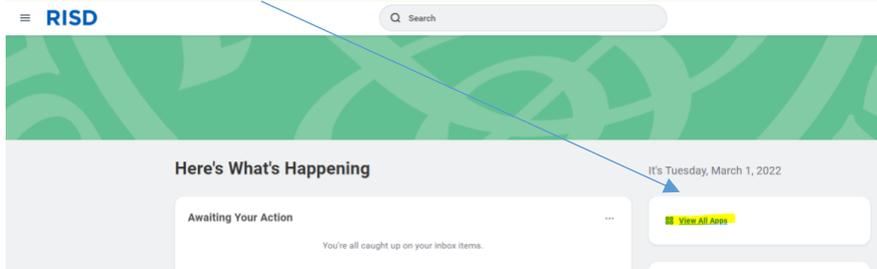


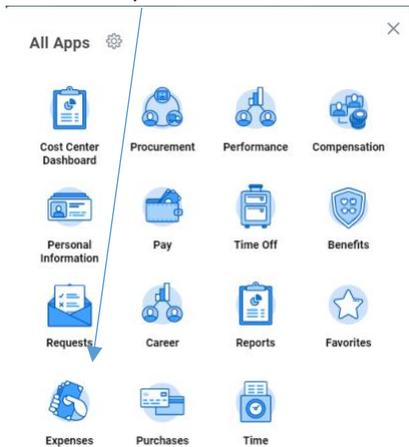
Employee Instructions for Educational Assistance

These steps should take place prior to starting the class

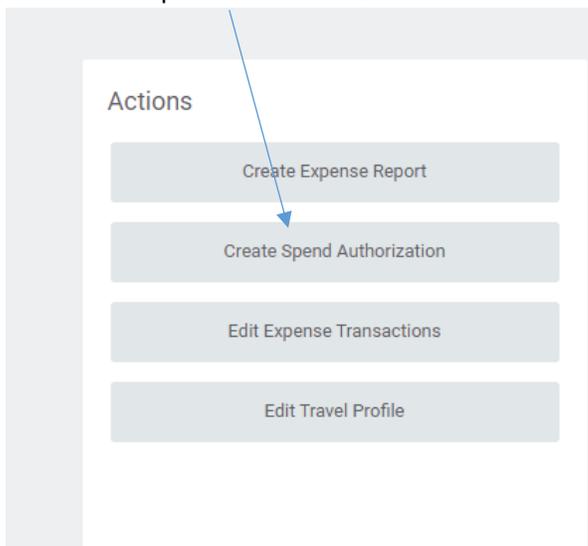
1. Log into Workday
2. Click on link to all apps



3. Click on expense worklet



4. Click create spend authorization



5. Dates will be pre-populated, they can stay, no need to change
6. For Description- put in the name of the class you are taking
7. For Business purpose- select from drop down – Educational Assistance, or you can type it in

▼ Spend Authorization Information

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

- 8.
9. For reimbursement pay type- auto defaults to check- can change to direct deposit if it is set up
10. For Justification- put in the reason for taking the class
11. Click add under spend authorization lines
12. For expense item- can select from list, will need to pick the new **Educational Assistance –FISCAL YEAR ALLOWANCE PLAN**, or you can type it in
13. Quantity- auto defaults to 1- leave it as 1
14. Put in the dollar you are looking to be reimbursed for under per unit amount or total cost (reminder the maximum educational assistance benefit is \$2500 per fiscal year)
15. **Change cost center to fringe benefits**- can choose from drop down or type in fringe
16. **It is looking for different function and worktag**
 - a. **Function – pick institutional support**
 - b. **Fund: F10 operating**
17. Click attachments (next to spend authorization lines)
18. Attach course catalog description and cost information.... So manager know more about course, when starting, costs, etc
19. Click submit
 - a. *At this time employee steps are done for requesting educational assistance. Remaining steps are for the manager and benefits partner to complete*
20. Next the request goes to manager for review/approval or send back if the manager has questions/needs more information
21. Once manager approves and clicks submit, request will go to benefits partner for review/approval as well
22. Benefits partner reviews, and can change amount if it is incorrect (more than tuition charge) or if it is over the maximum benefit they are eligible for in that fiscal year. Benefits partner can also send back with comments to the employee

Once class is complete these steps need to take place for the reimbursement to go through

23. After the class is successfully completed (grade A, B or C, or a Pass if the class is pass/fail) go to expense worklet
24. Click create expense report
25. Click the radio dial button next to create new expense report for spend authorization
26. Click the drop down and the educational assistance that was previously submitted and approved should be listed- select that
27. **Again make sure cost enter is Fringe Benefits**
28. Click OK
29. On the next page the expense item- select educational assistance (from drop down or type in)
30. Quantity- auto defaults to 1- leave it as 1
31. Put in dollar you are looking to be reimbursed for under per unit amount or total cost (reminder the maximum educational assistance benefit is \$2500 per fiscal year)
32. Click select files and attach grades and proof of payment for class
33. Click submit
 - a. *At this time employee steps are done for requesting educational assistance. Remaining steps are for the manager and cost center manger to approve*
34. Manager gets approval step- can approve, or send back to employee. Manger should check grades, proof of payment and confirm that cost center is listed as **fringe**. If not listed as fringe manger should send back to employee and tell them to update the cost center to fringe
35. Once manager approves then goes to cost center manager for final approval
36. Once cost center manager approves reimbursement will be processed