



# EDUCATIONAL ASSISTANCE JOB AID

## *How to Submit an Educational Assistance Expense Report*



### *Overview*

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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*

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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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# Academic Course

## Eligible Course

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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

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

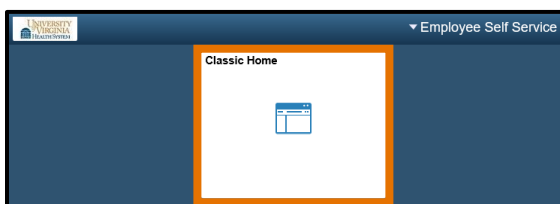
### Part I: Navigate to the Expense Report

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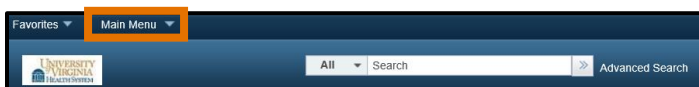
1. Click on the PeopleSoft Finance Expense Reimbursement link [here](#) or copy and paste the following URL into the Internet Explorer URL bar: <https://uvfnwb.hscs.virginia.edu:7014/psp/ps/>
2. Enter your UVA HS credentials and password into the applicable fields and click on the **Sign In** button



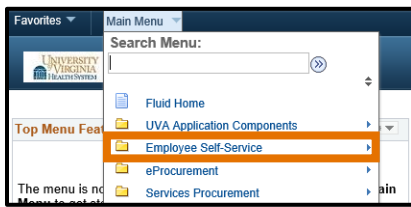
3. On the PeopleSoft Finance Expense Reimbursement homepage, click on the **Classic Home** button



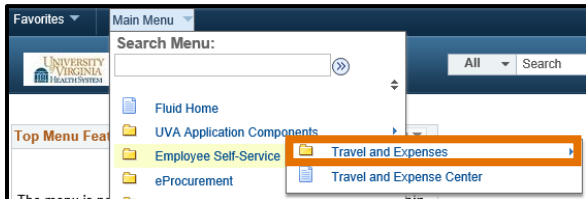
4. Click on the **Main Menu** drop-down in the menu bar in the upper left corner of the screen



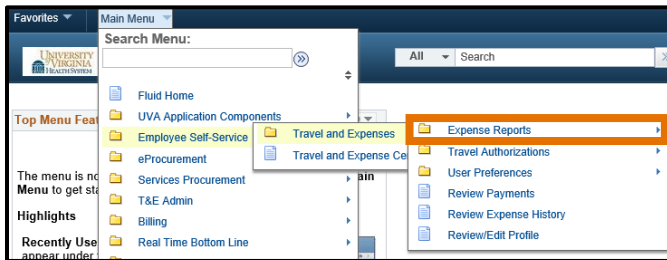
5. Click on the **Employee Self-Service** folder



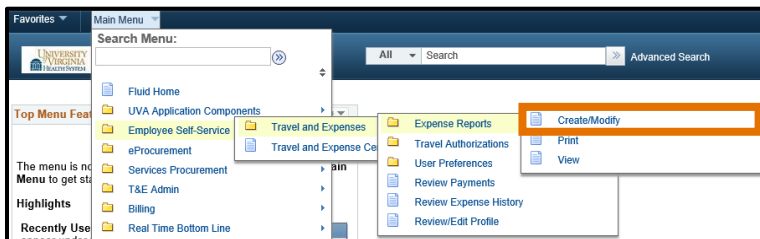
6. Click on the **Travel and Expenses** folder



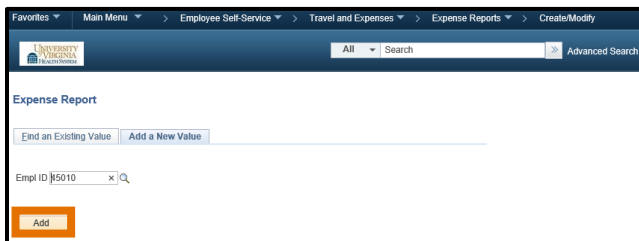
7. Click on the **Expense Reports** folder



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



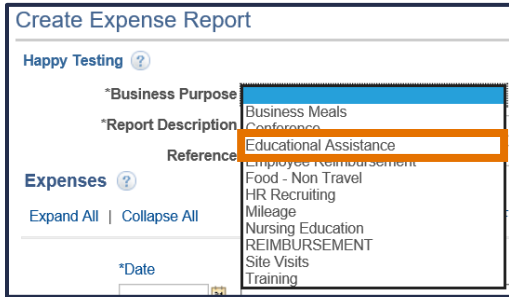
9. Click on the **Add** button under your Empl ID (Your Empl ID will auto-populate since you are logged into your personal account)



## Part II: Create Expense Report

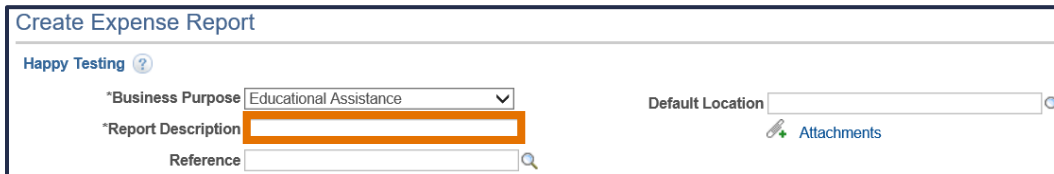
### \*REQUIRED FIELDS

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



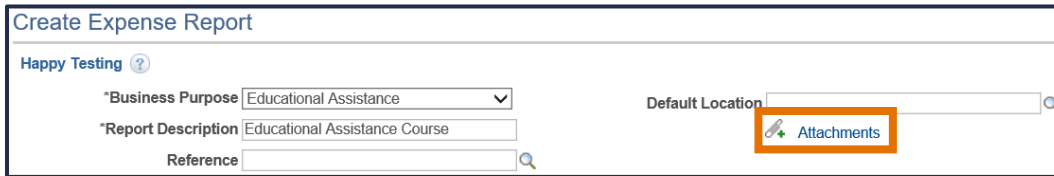
The screenshot shows the 'Create Expense Report' form. The 'Business Purpose' dropdown menu is open, displaying a list of options: Business Meals, Conference, Educational Assistance (highlighted), Employee Reimbursement, Food - Non Travel, HR Recruiting, Mileage, Nursing Education, REIMBURSEMENT, Site Visits, and Training. The 'Report Description' field is also visible and contains the text 'Educational Assistance'.

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



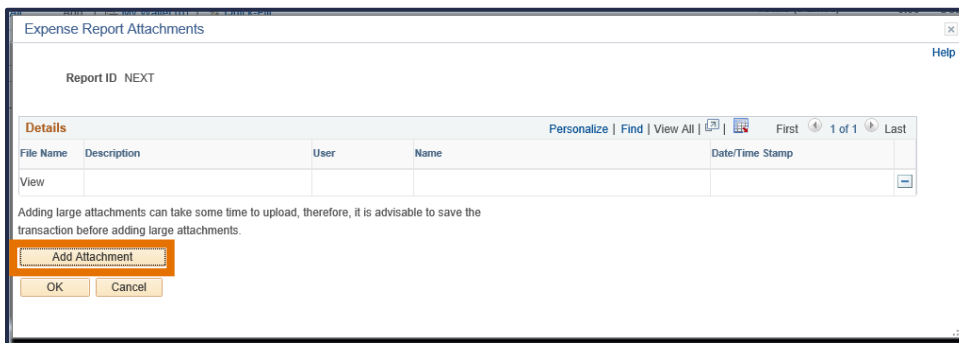
The screenshot shows the 'Create Expense Report' form. The 'Business Purpose' dropdown menu is set to 'Educational Assistance'. The 'Report Description' field is highlighted with an orange box, indicating where the user should enter the course name. The 'Reference' field is also visible.

12. Click on the **\*Attachments** link



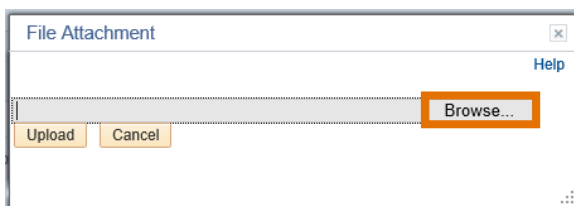
The screenshot shows the 'Create Expense Report' form. The 'Report Description' field now contains the text 'Educational Assistance Course'. The 'Attachments' link, represented by a plus sign and the word 'Attachments', is highlighted with an orange box.

13. Click on the **\*Add Attachment** button



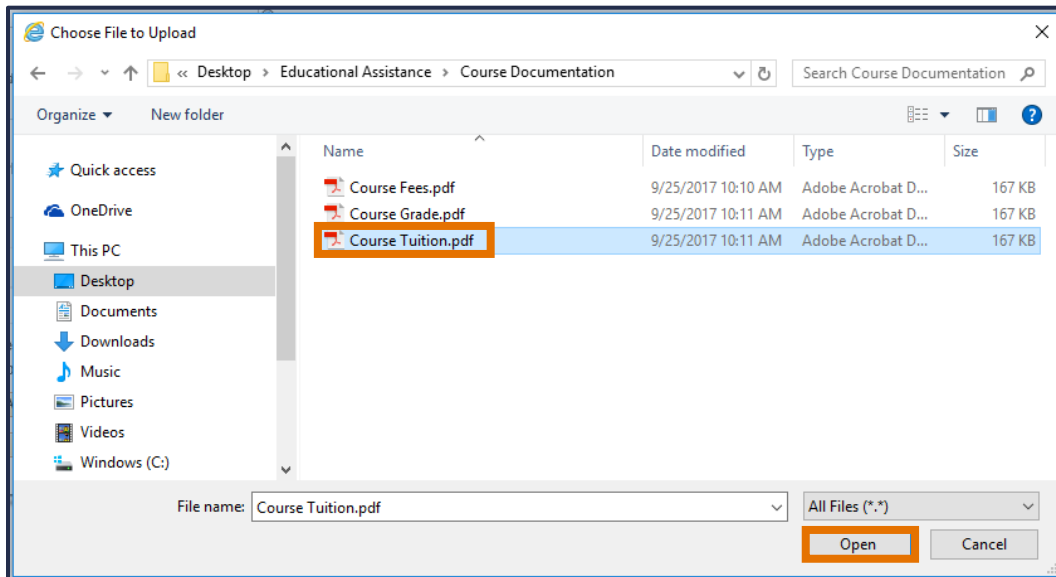
The screenshot shows the 'Expense Report Attachments' dialog box. It features a table with columns for File Name, Description, User, Name, and Date/Time Stamp. Below the table, there is a message: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.' The 'Add Attachment' button is highlighted with an orange box.

14. Click on the **Browse...** button

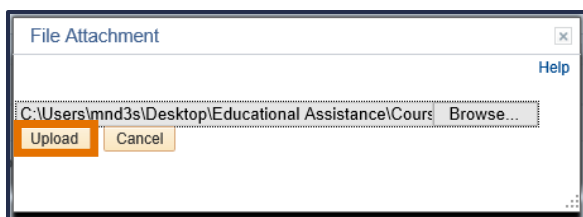


The screenshot shows the 'File Attachment' dialog box. It contains an input field for the file name and a 'Browse...' button, which is highlighted with an orange box. There are also 'Upload' and 'Cancel' buttons at the bottom.

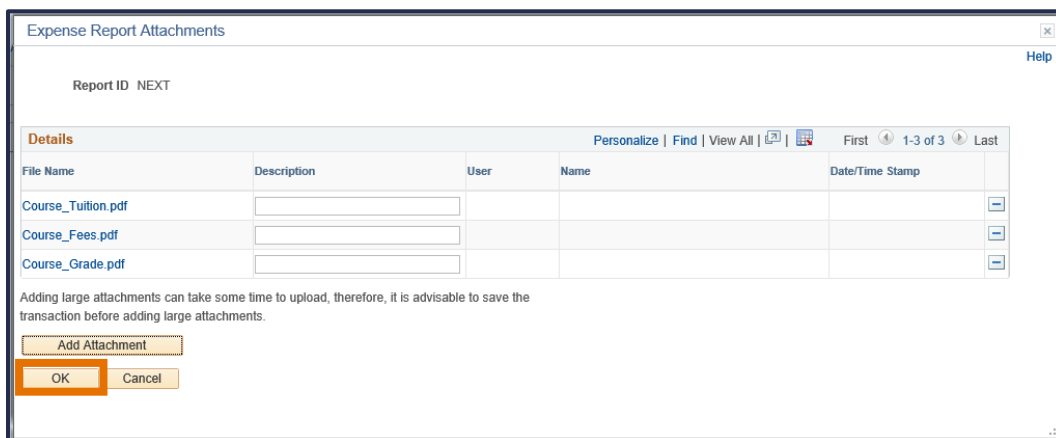
15. Locate and select your attachments (e.g., course description, tuition, fees, and/or copy of your transcript indicating your grades) and click on the **Open** button



16. Click on the **Upload** button



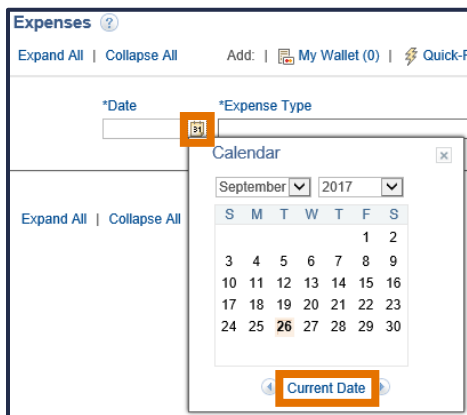
17. Repeat steps 13 through 16 until all attachments have been uploaded, then click on the **OK** button



## Part III: Expenses

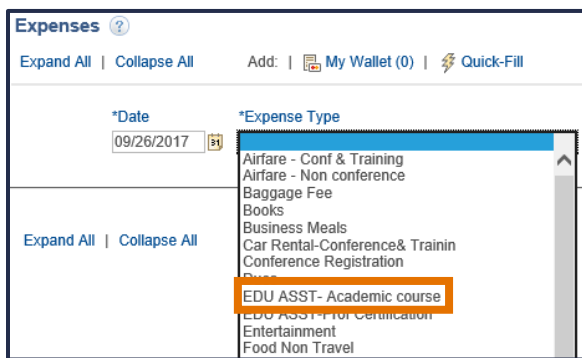
### \*REQUIRED FIELDS

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*)



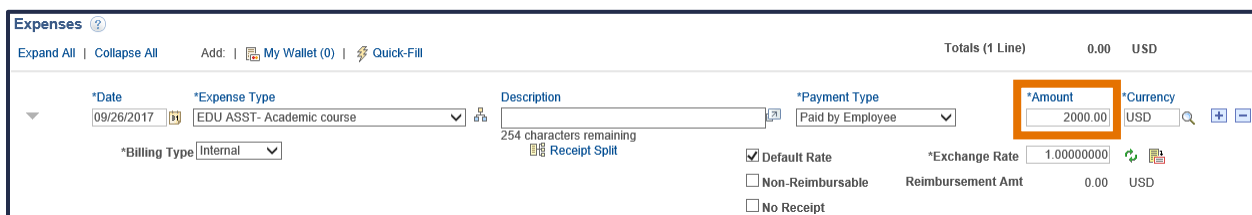
The screenshot shows the 'Expenses' form with the date field set to 09/26/2017. A calendar pop-up is displayed for September 2017. The 'Current Date' button at the bottom of the calendar is highlighted with a red box.

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



The screenshot shows the 'Expenses' form with the 'Expense Type' dropdown menu open. The option 'EDU ASST- Academic course' is highlighted with a red box.

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 screenshot shows the 'Expenses' form with the following fields filled: Date: 09/26/2017, Expense Type: EDU ASST- Academic course, Description: 254 characters remaining, Payment Type: Paid by Employee, Amount: 2000.00, Currency: USD, Billing Type: Internal, Exchange Rate: 1.00000000. The 'Amount' field is highlighted with a red box.

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

- Do not change the **\*Payment Type** (*The Payment Type is Paid by Employee*)
- Do not change the **\*Billing Type** (*The Billing Type is Internal*)
- 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)

The screenshot shows the 'Expenses' form with the following details:

- Totals (1 Line):** 0.00 USD
- \*Date:** 09/26/2017
- \*Expense Type:** EDU ASST- Academic course
- Description:** 254 characters remaining
- \*Payment Type:** Paid by Employee
- \*Amount:** 2000.00
- \*Currency:** USD
- \*Billing Type:** Internal
- \*Exchange Rate:** 1.00000000
- Reimbursement Amt:** 0.00
- Options:**  Default Rate,  Non-Reimbursable,  No Receipt

The screenshot shows a new line item being added to the Expenses form:

- \*Date:** 09/26/2017
- \*Expense Type:** (empty dropdown)
- Description:** 254 characters remaining
- \*Amount:** 0.00
- \*Currency:** USD

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

## Part IV: Educational Assistance Form

### \*REQUIRED FIELDS

The screenshot shows the 'Educational Assistance Form' with the following required fields and options:

- \*Course Title** (text input)
- \*Course #** (text input)
- \*Start Date** (calendar icon)
- \*End Date** (calendar icon)
- \*School Name** (text input)
- Address** (text input)
- City** (text input)
- State** (text input)
- Postal Code** (text input)
- \*Credit Hours** (text input)
- \*Tuition** (text input)
- Fees (Eligible)** (text input)
- Course is part of a degree program:**
- 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)?** (dropdown menu)
- 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?** (dropdown menu)
- 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.**

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)

Course is part of a degree program: <input checked="" type="checkbox"/>	*Degree Program <input style="width: 150px;" type="text"/>	*Degree Field <input style="width: 150px;" type="text"/>
*Anticipated Graduation Date <input style="width: 80px;" type="text"/>		(Nursing, Pharmacy, Business...)

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

Happy Testing

\*Business Purpose: Educational Assistance

\*Report Description: Educational Assistance Course

Reference: [Search]

Default Location: [Search]

Attachments (3)

Save for Later | **Summary and Submit**

Actions: ...Choose an Action | GO

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

Create Expense Report

Happy Testing

\*Business Purpose: Educational Assistance

\*Description: Name

Reference: [Search]

Totals

View Printable Version | View Analytics | **Notes** | Attachments

Employee Expenses (1 Line)	2,000.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee: 2,000.00 USD | Amount Due to Supplier: 0.00 USD

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

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

Expense Notes

[Text Input Area]

Add Notes

Notes

Notes	Name	Role	Date/Time
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OK | Cancel

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

Happy Testing

\*Business Purpose: Educational Assistance

\*Description: Name

Reference: [Search]

Totals

View Printable Version | View Analytics | Notes | Attachments

Employee Expenses (1 Line)	2,000.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee: 2,000.00 USD | Amount Due to Supplier: 0.00 USD

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

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** Save for Later | Expense Details

Happy Testing Actions: ...Choose an Action

\*Business Purpose: Educational Assistance  
 \*Description: Name  
 Reference:

**Totals** View Printable Version | View Analytics | Notes | Attachments

Employee Expenses (1 Line)	2,000.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 2,000.00 USD**      **Amount Due to Supplier 0.00 USD**

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

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

**Expense Report Submit Confirm** Help

Create Expense Report

**Submit Confirmation**

Happy Testing

**Totals**

Employee Expenses (1 Line)	2,000.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 2,000.00 USD**      **Amount Due to Supplier 0.00 USD**

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

**Totals** View Printable Version | View Analytics | Notes | Attachments

Employee Expenses (1 Line)	2,000.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 2,000.00 USD**      **Amount Due to Supplier 0.00 USD**

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

## 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.

# Professional Certification

## Eligible Professional Certification

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

## Instructions

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

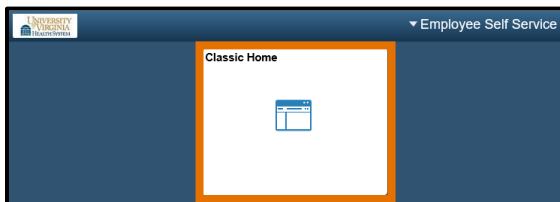
### Part I: Navigate to the Expense Report

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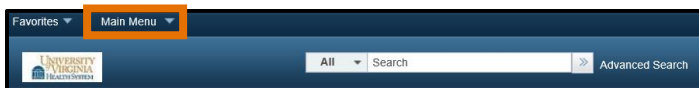
1. Click on the PeopleSoft Finance Expense Reimbursement link [here](#) or copy and paste the following URL into the Internet Explorer URL bar: <https://uvfnwb.hscs.virginia.edu:7014/psp/ps/>
2. Enter your UVA HS credentials and password into the applicable fields and click on the **Sign In** button



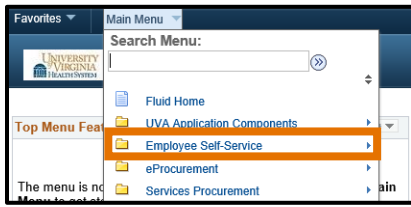
3. On the PeopleSoft Finance Expense Reimbursement homepage, click on the **Classic Home** button



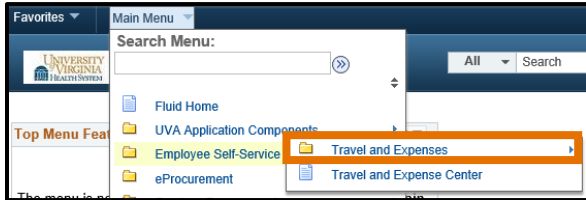
4. Click on the **Main Menu** drop-down in the menu bar in the upper left corner of the screen



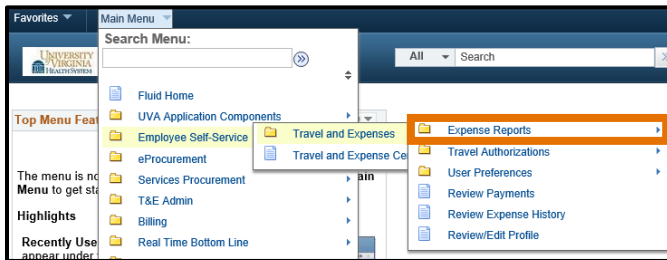
5. Click on the **Employee Self-Service** folder



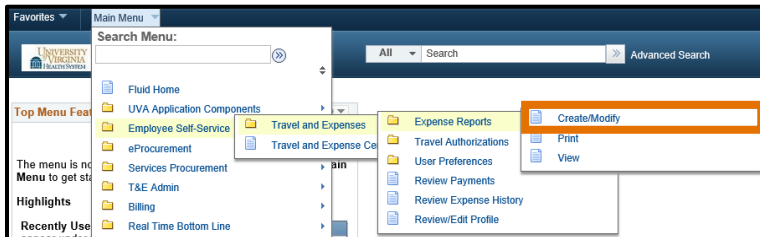
6. Click on the **Travel and Expenses** folder



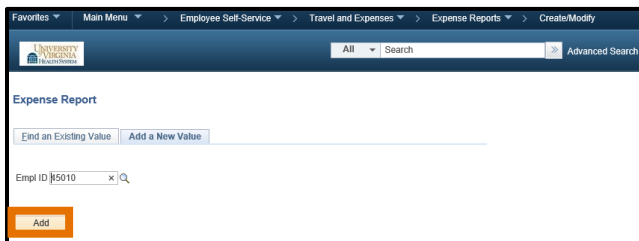
7. Click on the **Expense Reports** folder



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



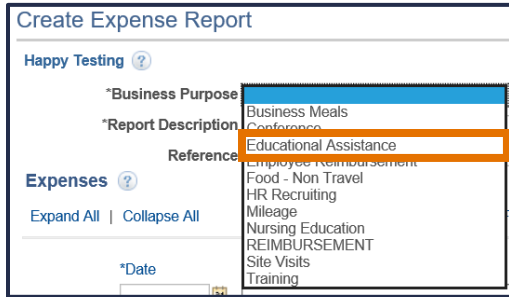
9. Click on the **Add** button under your Empl ID (Your Empl ID will auto-populate since you are logged into your personal account)



## Part II: Create Expense Report

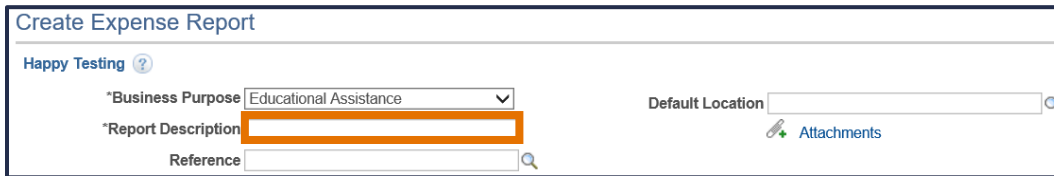
### \*REQUIRED FIELDS

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



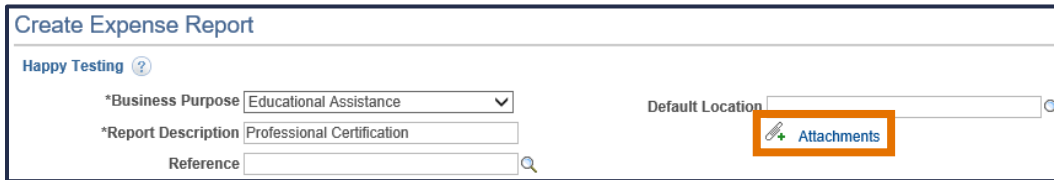
The screenshot shows the 'Create Expense Report' form. The 'Business Purpose' dropdown menu is open, displaying a list of options: Business Meals, Conference, Educational Assistance (highlighted in orange), Employee Reimbursement, Food - Non Travel, HR Recruiting, Mileage, Nursing Education, REIMBURSEMENT, Site Visits, and Training. The 'Report Description' field is also highlighted in orange.

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



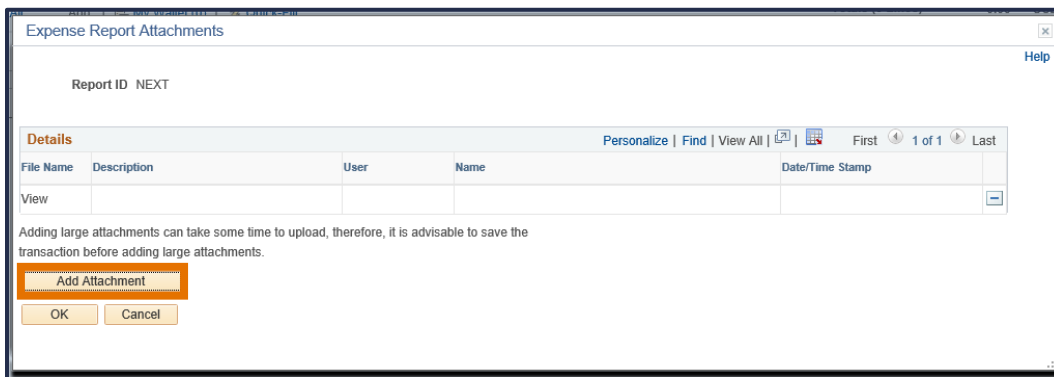
The screenshot shows the 'Create Expense Report' form. The 'Business Purpose' dropdown menu is set to 'Educational Assistance'. The 'Report Description' field is highlighted in orange and contains the text 'Professional Certification'. The 'Reference' field is empty.

12. Click on the **\*Attachments** link



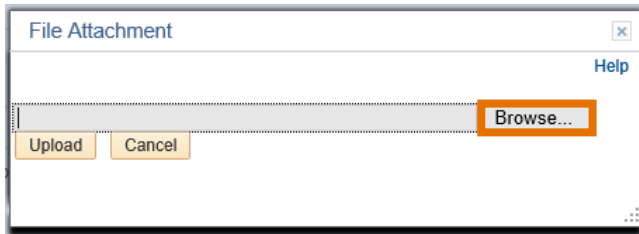
The screenshot shows the 'Create Expense Report' form. The 'Business Purpose' dropdown menu is set to 'Educational Assistance'. The 'Report Description' field contains 'Professional Certification'. The 'Attachments' link is highlighted in orange.

13. Click on the **\*Add Attachment** button

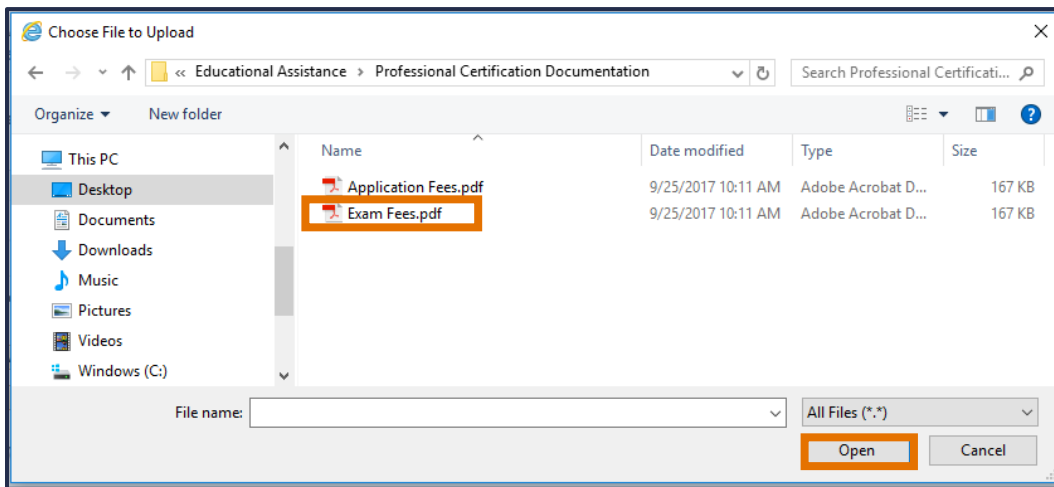


The screenshot shows the 'Expense Report Attachments' dialog box. The 'Add Attachment' button is highlighted in orange. The dialog box contains a table with columns for File Name, Description, User, Name, and Date/Time Stamp. Below the table, there is a message: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.'

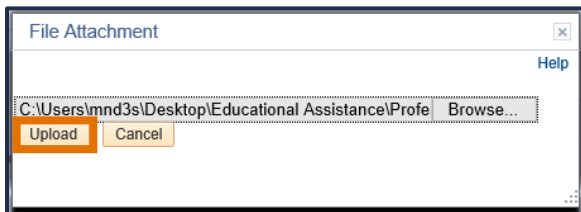
14. Click on the **Browse...** button



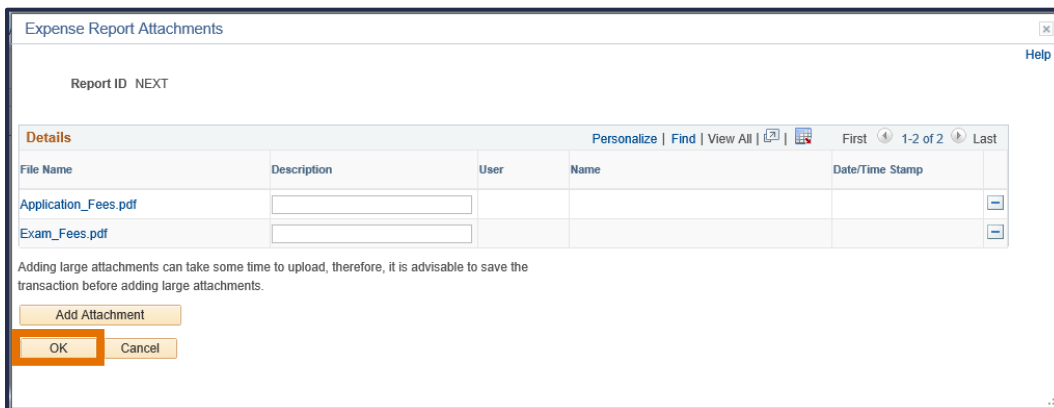
15. Locate and select your attachments (e.g., application and/or exam fees) and click on the **Open** button



16. Click on the **Upload** button



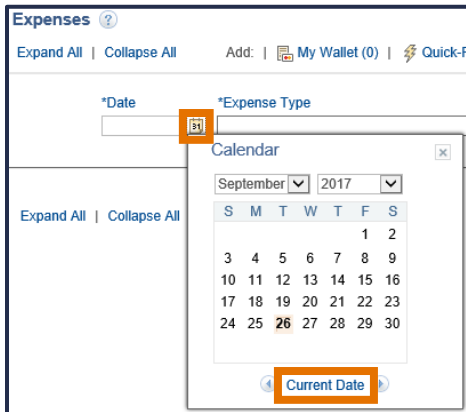
17. Repeat steps 13 through 16 until all attachments have been uploaded, then click on the **OK** button



## Part III: Expenses

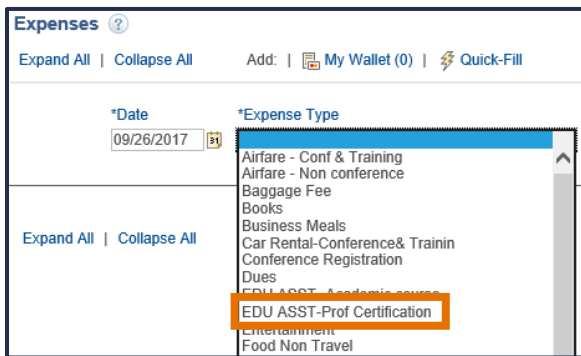
### \*REQUIRED FIELDS

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*)



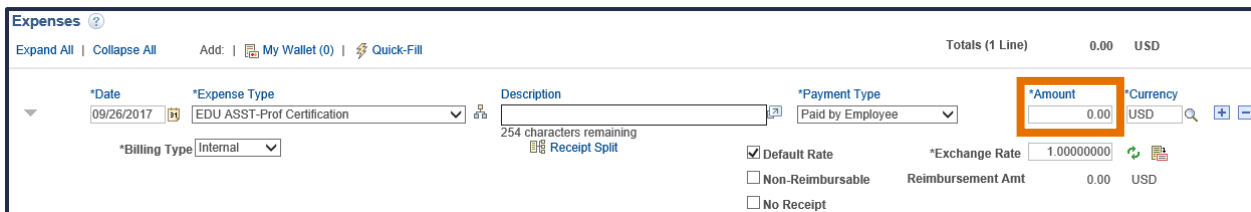
The screenshot shows the 'Expenses' form with the date field set to 09/26/2017. A calendar pop-up is displayed, showing the month of September 2017. The date 26 is highlighted in blue, and a 'Current Date' button is visible at the bottom of the calendar.

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



The screenshot shows the 'Expenses' form with the date field set to 09/26/2017. The 'Expense Type' dropdown menu is open, showing a list of options. 'EDU ASST-Prof Certification' is highlighted in blue.

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 screenshot shows the 'Expenses' form with the date field set to 09/26/2017 and the expense type set to 'EDU ASST-Prof Certification'. The 'Amount' field is highlighted in blue and contains the value 0.00. The 'Currency' field is set to USD. The 'Payment Type' is set to 'Paid by Employee' and the 'Billing Type' is set to 'Internal'. The 'Exchange Rate' is set to 1.00000000.

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

- Do not change the **\*Payment Type** (*The Payment Type is Paid by Employee*)
- Do not change the **\*Billing Type** (*The Billing Type is Internal*)
- Do not change the **\*Exchange Rate** (*The Exchange Rate is 1.00000000*)



## Part IV: Educational Assistance Form

### \*REQUIRED FIELDS

The screenshot shows a web form titled "Educational Assistance Form". It contains the following fields:

- \*Professional Certification Type (drop-down menu)
- \*Professional Certification Title (text input)
- \*Certification Abbreviation (text input)
- \*Certifying Institution (text input)
- Fees (Eligible) (text input)

Below the fields is a checkbox with the text: "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."

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)

The screenshot shows the "Create Expense Report" form. It includes the following elements:

- Buttons: "Save for Later" and "Summary and Submit" (highlighted in orange).
- Actions: "...Choose an Action" dropdown and "GO" button.
- Fields: "Happy Testing" (with a help icon), "\*Business Purpose" (dropdown menu showing "Educational Assistance"), "Default Location" (text input with search icon), "\*Report Description" (text input showing "Professional Certification"), "Reference" (text input with search icon), and "Attachments (2)" (with a pencil icon).

29. If you would like to enter a note for your manager, click on the **Notes** link

Create Expense Report Save for Later | Expense Details

Happy Testing Actions ...Choose an Action GO

\*Business Purpose Educational Assistance  
\*Description Prof Cert Name  
Reference

Totals View Printable Version View Analytics **Notes** Attachments (2)

Employee Expenses (1 Line)	375.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 375.00 USD** **Amount Due to Supplier 0.00 USD**

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

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.

Expense Notes Help

**Add Notes**

Notes

Notes	Name	Role	Date/Time
-------	------	------	-----------

OK Cancel

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)

Create Expense Report Save for Later | Expense Details

Happy Testing Actions ...Choose an Action GO

\*Business Purpose Educational Assistance  
\*Description Prof Cert Name  
Reference

Totals View Printable Version View Analytics Notes Attachments (2)

Employee Expenses (1 Line)	375.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 375.00 USD** **Amount Due to Supplier 0.00 USD**

**By checking this box, I certify the expenses submitted are accurate and comply with expense policy.**

Submit Expense Report

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)

Create Expense Report Save for Later | Expense Details

Happy Testing Actions ...Choose an Action GO

\*Business Purpose Educational Assistance  
\*Description Prof Cert Name  
Reference

Totals View Printable Version View Analytics Notes Attachments (2)

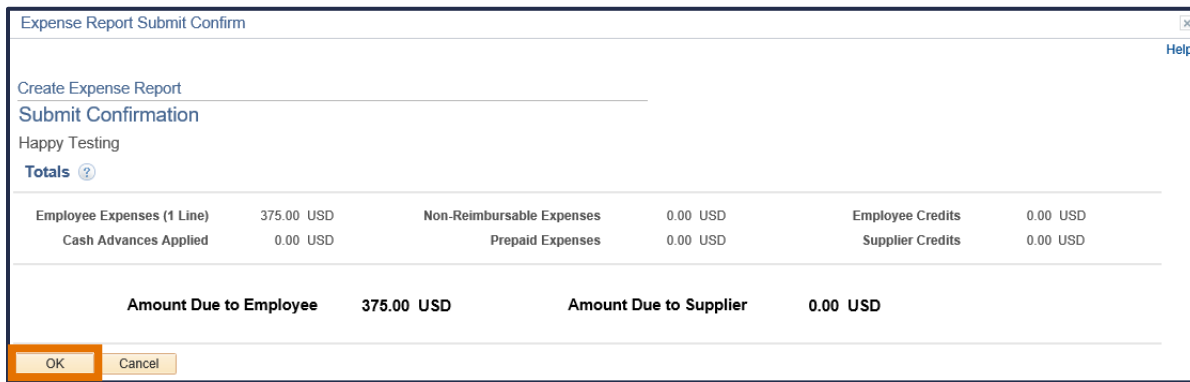
Employee Expenses (1 Line)	375.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

**Amount Due to Employee 375.00 USD** **Amount Due to Supplier 0.00 USD**

**By checking this box, I certify the expenses submitted are accurate and comply with expense policy.**

**Submit Expense Report**

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



Expense Report Submit Confirm

Create Expense Report

Submit Confirmation

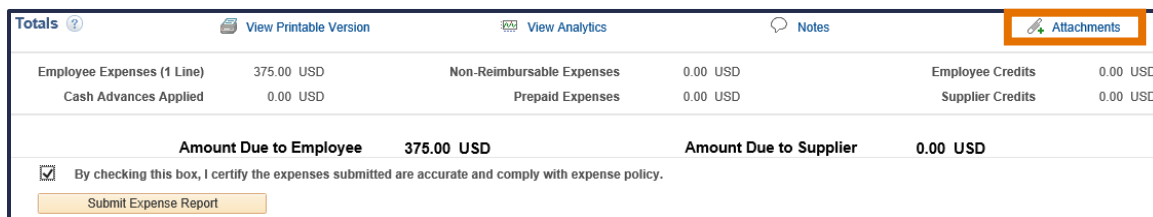
Happy Testing

Totals ?

Employee Expenses (1 Line)	375.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
<b>Amount Due to Employee</b>		<b>375.00 USD</b>	<b>Amount Due to Supplier</b>		<b>0.00 USD</b>

OK Cancel

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 17 above for additional guidance), then repeat steps 30 and 31



Totals ? View Printable Version View Analytics Notes Attachments

Employee Expenses (1 Line)	375.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
<b>Amount Due to Employee</b>		<b>375.00 USD</b>	<b>Amount Due to Supplier</b>		<b>0.00 USD</b>

By checking this box, I certify the expenses submitted are accurate and comply with expense policy.

Submit Expense Report

## ***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

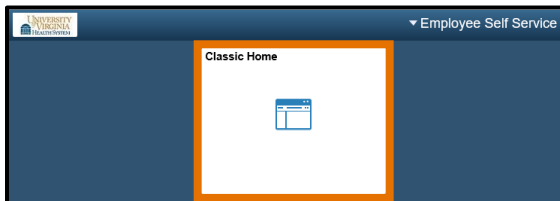
## View Expense Reports

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

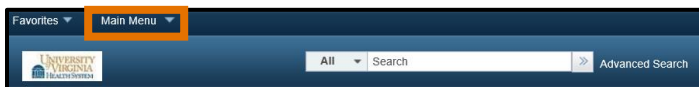
1. Click on the PeopleSoft Finance Expense Reimbursement link [here](https://uvfnwb.hscs.virginia.edu:7014/psp/ps/) or copy and paste the following URL into the Internet Explorer URL bar: <https://uvfnwb.hscs.virginia.edu:7014/psp/ps/>
2. Enter your UVA HS credentials and password into the applicable fields and click on the **Sign In** button



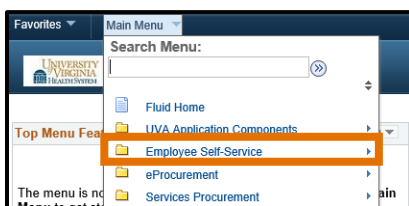
3. On the PeopleSoft Finance Expense Reimbursement homepage, click on the **Classic Home** button



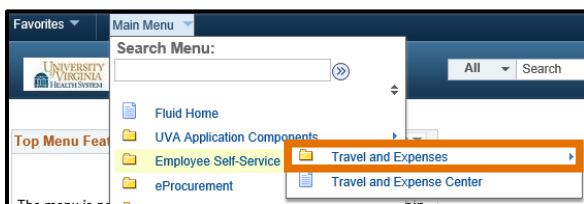
4. Click on the **Main Menu** drop-down in the menu bar in the upper left corner of the screen



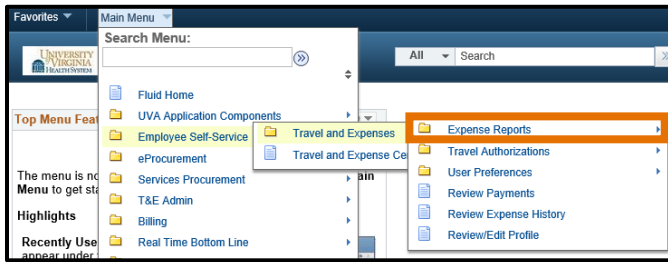
5. Click on the **Employee Self-Service** folder



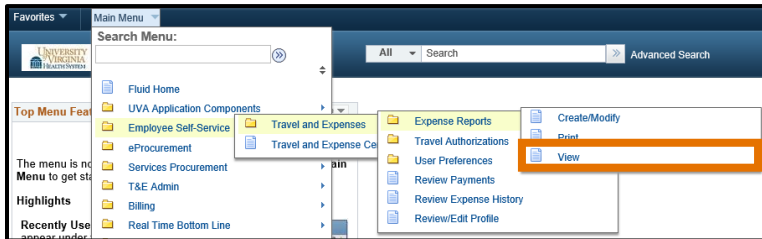
6. Click on the **Travel and Expenses** folder



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

A screenshot of the 'Expense Report' search criteria form. It includes fields for Report ID, Report Description, Name, Empl ID, Report Status, and Creation Date, each with a 'begins with' dropdown and a text input field. There is also a 'Case Sensitive' checkbox and a 'Search' button highlighted with an orange box. Other buttons include 'Clear', 'Basic Search', and 'Save Search Criteria'.

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

Report ID	Report Description	Name	Empl ID	Report Status	Creation Date
0000011465	Academic Course Name Goes Here	Testing,Happy	45010	Submitted	10/03/2017
0000011461	NURSING	Testing,Happy	45010	In Process	09/28/2017
0000011460	Course Name Goes Here	Testing,Happy	45010	Submitted	09/27/2017
0000011459	Course Name Goes Here	Testing,Happy	45010	Submitted	09/27/2017
0000011456	Professional Certification	Testing,Happy	45010	Pending	09/26/2017
0000011455	Educational Assistance Course	Testing,Happy	45010	Pending	09/26/2017
0000011454	Course Name	Testing,Happy	45010	In Process	09/25/2017
0000011453	COBOL PROGRAMMING	Testing,Happy	45010	In Process	09/21/2017
0000011452	COBOL PROGRAMMING	Testing,Happy	45010	Submitted	09/21/2017
0000011451	APTD	Testing,Happy	45010	Submitted	09/21/2017