

## Before You Get Started

This is a temporary job aid. [Workday Digital Assist \(WDA\)](#) is the primary support tool for Workday and provides detailed **just-in-time guidance** and step-by-step instructions to help complete tasks. We highly recommend that you click the “need help” button in Workday to use (WDA) instead of using the job aid.

[Education Benefits](#) can be requested through Workday for all [eligible employees](#) who have been in a benefited position for at least 6 consecutive months. You will find the following walk-throughs in this job aid:

- Request Education Benefits
- Upload Proof of Grades and Payment (Advance Funding Only)
- View My Approval, Payment Progress, or Request History

Please see the Education Benefit page for further details and FAQs.

## Request Education Benefits

Requests for payment can be submitted prior to the course, conference (Academic employees only), or training for pre-payment purposes, or as a reimbursement. You will need documentation of cost to complete this request.

**Note: If your request times out, or if it was submitted with errors, then please contact [AskHR@virginia.edu](mailto:AskHR@virginia.edu) to have the request sent back to you.**

1. Enter **Education Benefit Request** in the search box.
2. Click on **Create New Request** in the Education Benefit Dashboard.
3. Complete the following fields:
  - **Funded By**
    - Central Funding for Education Benefit if you are using the annual balance of your Education Benefit for funding
    - Departmental Funding if your department is paying for the course, program, or conference (funding for conferences is permitted for Academic Division only) outside of your Education Benefit limits
  - **Assistance Type**
    - Tuition
    - Professional Development
  - **Program Type** (and name of degree if tuition)
  - **Education Provider**



- **Please enter an explanation of how this relates to your job and a link to the program**
- Click the plus sign to add **Course Name** details – note that you can submit multiple courses on the same request as long as they are all advance funding, or all reimbursement
  - Course / Credentialing Certification / Conference (funding for conferences is permitted for Academic division only)
  - Start date (date the course/conference/certification starts – must be within 90 days of request)
  - Stop date (date the course/conference/certification was completed)
  - Participation type (if it is a hybrid program, then please select in-person)
  - Cost (cannot exceed cost of program and/or [benefit limits](#))

4. Click the “**I Agree**” box if you agree with the Legal Agreement.

5. Note that pressing submit will finalize this portion of your request, and you will not be able to revise it unless if it is sent back to you by the approver.

6. Click **Submit**

**YOU HAVE NOT YET COMPLETED YOUR REQUEST.**

7. Attachments

- Advance funding requires an attached invoice/cost of the program, or a full https link to the program page indicating the cost, then click **OK**.
- Reimbursement requests require you to upload your substantiation now (itemized invoice, proof of payment, proof of passing/certification/conference attendance), then click **OK**.

8. Click **OK** in the **Education Benefit Request - Submit for Approval** pop-up

9. Routing for approval

- Central Funding requests route to HR for review and funding
- Departmental funds requests route to your manager for approval, and FDM/Cost Center entry, then to HR for review and funding

10. Funding - once approved, funds are allocated within two pay periods

**Upload Grades and Payment Information (Advance Funding Only)**

You must submit your [required documentation](#) within 30 days of the stop date.

**Requests made/paid in 2023**

1. Click on the task in your Workday Inbox



- Upload the documentation
- Click the box to confirm that you are uploading accurate information
- Click **Submit**

### Requests made/paid in 2022 (Academic division only)

Only one file can be loaded to Workday for this step. Take screen shots of all documents and place them in a single file (Word, PowerPoint, pdf, etc.).

2. Go to your Workday Inbox and locate the task: **Request Process: Education Benefits (Academic Employees Only)**

3. Check the **I Agree** checkbox after reading the attestation.

4. Click the **Select files** and navigate to the single file that includes both proof of payment and final grade(s). Only one file can be attached. If needed, take screen shots of documentation, and paste them in a single Word/PowerPoint file.

5. Click

## View My Approval, Payment Progress, or Request History

Workday tracks all processes and allows you to view where your quest is and when each step in the approval was completed.

### Requests made/paid in 2023

1. Enter **Education Benefit Request** in the search box.

2. Find the appropriate request on your Dashboard and click on **Status**, or **Request Details**

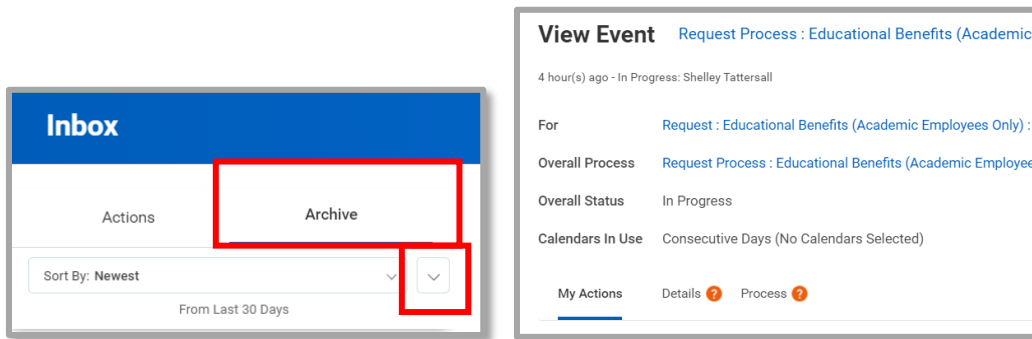
- Status – allows you to see where the process is pending action
- Request Details – allows you to see the request you have submitted along with the documentation

### Requests made/funded in 2022 (Academic division only)

1. Click on the **Workday inbox** in the upper, right corner of the screen.



2. Click on the **Archive** tab above the task listing, and look for a task beginning with **Request Process: Education Benefits**



3. Tasks are listed in chronological order of completion. If your submission is over 30 days old, click on the down arrow below the Archive tab.
4. Enter a span of dates that would capture when you submitted your most recent request.
5. When the task is found, click on it so it appears on the screen.
6. Click on the **Process** tab.
7. The table displays each step that occurs for an Education Benefits request, your part in the business process, other's parts in the process, and when the steps were completed.
8. Click **Remaining Process** below the table to view any additional processes that have not been completed.