EMPLOYEE EDUCATIONAL ASSISTANCE
DocuSign Form Instructions - Employee

1. **Log in to Banner Self-Service**

2. **Select "*Employee*", "*Employee Forms*", then "*Employee Educational Assistance Form*" – Takes you to a brief summary/contact page** (shown below)

> Employee Educational Assistance
>
> The Employee Educational Assistance form must be completed by every employee wishing to take part in the Educational Assistance program. If you have any questions please contact the Tax Compliance Office at 221-2497 or tax@wm.edu:
> Employee Educational Assistance Form
> (Please click link only if you intend to fill out the document.)

3. **Select "*Employee Educational Assistance Form*" (in purple) – Opens the form in DocuSign**
   NOTE: If you do not have an account in DocuSign, then the box shown below will appear. You must check the box, agreeing to electronic records and signatures, before you can access the form.

   > Please read the Electronic Record and Signature Disclosure.
   > ☑ I agree to use electronic records and signatures.

4. **Click "CONTINUE", then "START" – Takes you to the first red box in Section A**
   NOTE: Red boxes are required fields and must be completed before the form can be submitted. All other boxes are optional, but we encourage you to complete them.

5. **Complete Sections A, B and C**

   - Section A: Employee Information - Before completing this section, you must ensure you are an eligible employee to participate in the program, as defined by the policy. If you are unsure whether you are eligible or not, then contact Human Resources **prior to** completing this form.
     - ❖ Your First and Last Name, Banner ID, and Email will automatically populate, as shown below, and cannot be changed.

   > SECTION A: Employee Information
   >
   > Full Name: Fellows (Last)   Cindi (First)   M.I.
   > Banner ID: 930633165   Phone: _____   Email: clfellows@wm.edu

   - ❖ Fill-in the remaining red boxes *(required)* and the grey box for your Middle Initial *(optional)*

   > Full Name: Fellows (Last)   Cindi (First)   M.I.
   > Banner ID: 930633165   Phone: 757-221-2497   Email: clfellows@wm.edu
   > Work Department: Finance   Work Phone: 757-221-3323

   - ❖ Select the appropriate radio button for either "*Faculty and Staff*" or "*Hourly*"

   > Check One: ● Faculty and Staff
   > *(Who Participate in the VRS or ORP Retirement Program)*
   > ○ Hourly
   >
   > **Eligible Employees** – Faculty and staff who participate in the VRS or ORP retirement program. Hourly employees who are eligible for paid time off may also be eligible. Contact Human Resources for further guidance.

- Section B: Course Information – In this section you will list all courses you intend to take during a particular semester, even if the total credits exceed the 6 maximum credits to be waived.
    - ❖ Select the applicable radio buttons under "*Student Level*" and "Semester", and enter the applicable **calendar** year

SECTION B: Course Information		
I apply for educational assistance (**up to a maximum of 6 credit hours**) in relation to the following course(s):		
Student Level: ◯ Undergraduate ⦿ Graduate	**Semester:** ◯ Fall ◯ Spring ⦿ Summer	**Year:** 2019

   - ❖ Fill-in the requested course information for all courses being taken
     NOTE: The first line of red boxes must be completed to submit the form. The additional grey boxes can be completed for any additional classes you may be taking.

	Course Name	Course Number and Section	Course Reference Number (CRN)	Credit Hours	Days	Class Start Time	Class End Time
First:	Financial Accounting	BUAD 5103-01	24689	3	T	7:00pm	9:50pm
Second:	Organizational Behav	BUAD 5503-01	24692	3	R	7:00pm	9:50pm
Third: (if applicable)							
Fourth: (if applicable)							
			Total Credit Hours:	6.00		Initial ⬇	

   - ❖ Enter the Last Day to Add/Drop Classes (as it relates to your program or the courses you intend to take) in the following format xx/xx/xxxx and select the "Initial" yellow box (shown below).

Total Credit Hours:	6.00	Initial ⬇
Last Day to Add/Drop Classes:	05/17/2019	Employee Must Initial

   - ❖ Select your initials and hit enter - This creates your digitally signed initials (as shown below)

Total Credit Hours:	6.00	DS CF
Last Day to Add/Drop Classes:	05/17/2019	Employee Must Initial

- Section C: Employee Agreement and Signature - Please read the bullets carefully before signing, as your signature indicates that you have read them, you understand them, and you agree to them.
    - ❖ If you agree to them, then select the "Sign" yellow box (shown below), at the bottom of page
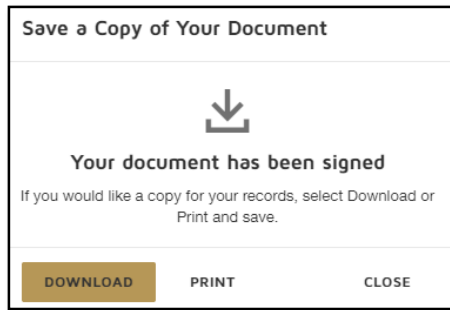
Signature:	Sign ⬇	Date:	3/15/2019 | 15:04:29 EDT

   - ❖ Select your signature and hit enter - This creates your e-signature (as shown below)

Signature:	DocuSigned by: Cindi Fellows	Date:	3/15/2019 | 15:04:29 EDT

6. **Click "FINISH"**
    - ❖ A message box will appear (shown below) – This gives you an opportunity to download or print a copy of the completed form for your records, otherwise select "CLOSE."

❖ A message will appear on the left-hand side of the green bar at the top of the screen (shown below), along with an image of your completed form - This indicates, the form has been submitted and forwarded to your direct supervisor for review and approval. You also have another opportunity to download or print a copy for your records. Otherwise, select "CLOSE."
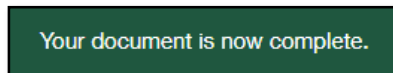
❖ A final message screen will appear (shown below) – This indicates, everything has been completed and you can close the browser.

7. **Once the request has been routed to all departments, an email will be sent to you indicating the form is completed. Use the link provided in the email to access the final version of the form.**
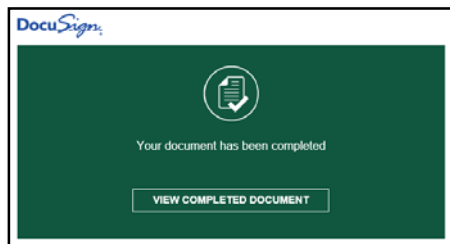
NOTE: The message in the body of the email will indicate that the form is awaiting your approval. This is a default message from DocuSign that we can only edit once. Please Ignore.

❖ If the request was denied by a direct supervisor, then you will see the appropriate radio button selected and an explanation (if required) in Section D. Sections E, F, and G will have "Request Previously Denied" selected.

❖ If the request was denied by Human Resources, then you will see the "Employee **is not eligible** for the Educational Assistance Program – **Must provide explanation in box below**" radio button selected and an explanation in Section E. Sections F and G will have "Request Previously Denied" selected.

❖ Otherwise, all sections will be completed, indicating the request was approved, accepted and a waiver was applied to your student account.

❖ You will also see the taxable amount of your educational assistance (if any) in the "Amount to be Taxed" box under Section G, which was determined by Payroll prior to finalizing the form.

NOTE: If your request is denied by either your supervisor or Human Resources, then you should receive an email within a few days or weeks of your submission. If your request is approved, then you will not receive an email until after the semester charges have been posted, which could be several weeks depending on when you submitted your request.