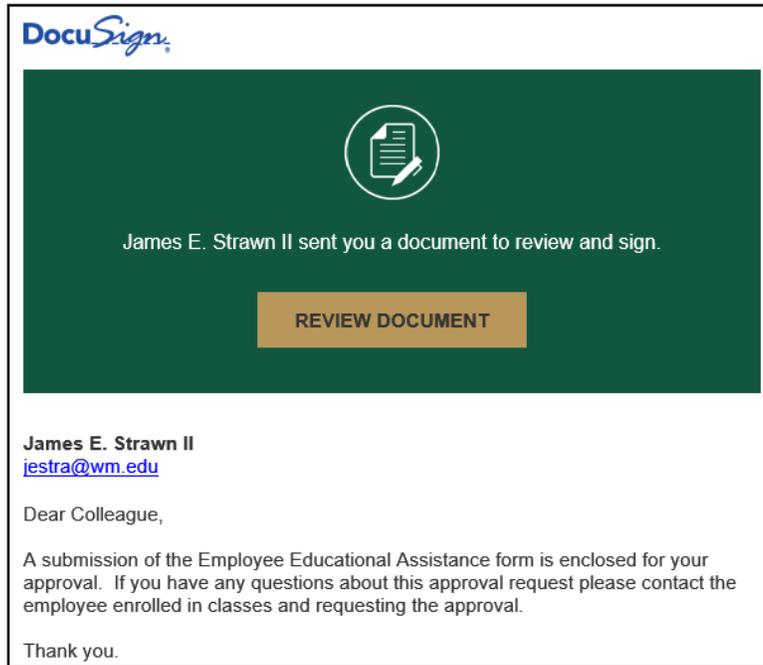|	EMPLOYEE EDUCATIONAL ASSISTANCE
WILLIAM & MARY CHARTERED 1693	**EMPLOYEE EDUCATIONAL ASSISTANCE** **DocuSign Form Instructions - Supervisor**

Once the employee has submitted their *Employee Educational Assistance Form*, an email will be sent to you indicating a form is awaiting approval with a link to DocuSign (shown below).

1. **Click the email link - 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.

2. **Click "CONTINUE", then "START" – Takes you to the first red radio button in Section D**
   NOTE: Red radio buttons and 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.

3. **Complete Section D: Departmental Approval**
   Please read each bullet carefully before selecting an option and signing, as your signature indicates that you have read them, you understand them, performed any actions required by them, and you agree to them. The following section provides further guidance to assist you with each bullet.

   A. First Bullet **-ACTION REQUIRED-**

   > • *The employee is eligible for educational assistance under the University policy and may apply for enrollment in the course(s) noted on this form.*

   It is your responsibility to ensure an employee is eligible to participate in the Educational Assistance Program.

   1. If an employee **is considered** eligible, then continue on to the Second Bullet.

2. If an employee **is not considered** eligible, then…

    a) Select the radio button shown below

> ◉ Educational Assistance Request **has not been** approved – **Must provide explanation in the box below**

    b) In the explanation box, type the reason why employee is not considered eligible

> ◉ Educational Assistance Request **has not been** approved – **Must provide explanation in the box below**
> Employee making the request is currently on leave without pay

B. <u>Second Bullet</u> **-ACTION REQUIRED-**

> • *The Last Day to Add/Drop Classes noted by the employee has been verified and their request occurred on or before this date. If either statement is incorrect, then the request has been denied below.*

It is your responsibility to ensure the Last Day to ADD/Drop Classes date, as entered by the employee, is correct <u>AND</u> their request was submitted on or before such date.

    1. If the date is correct <u>AND</u> the request was submitted on or before the Last Day to Add/Drop Classes, then continue on to the Third and Fourth Bullets.

    2. If date entered by the employee is incorrect, then select the radio button shown below

> ◉ Educational Assistance Request **has not been** approved – Last Day to Add/Drop Classes Date is Incorrect

    3. If request was submitted after the Last Day to Add/Drop Classes date, then select the radio button shown below

> ◉ Educational Assistance Request **has not been** approved – Submitted after the Last Day to Add/Drop Classes

    4. If there is another **valid** reason to not approve, then…

       NOTE: An employee's request should generally be approved <u>**IF**</u> (1) employee is eligible to participate in the program <u>**AND**</u> (2) the form was submitted on or before the Last Day to Add/Drop Classes.

       a) Select the radio button shown below

> ◉ Educational Assistance Request **has not been** approved – **Must provide explanation in the box below**

       b) In the explanation box, type a valid reason why the request is not being approved

> ◉ Educational Assistance Request **has not been** approved – **Must provide explanation in the box below**
> One of the classes is during normal work hours, which cannot be accomodated at this time. Another class selection is required.

C. <u>Third and Fourth Bullets</u> **-NO ACTION REQUIRED-**

> • *The department will be subject to the cost of the course if it is determined that the employee is actually not eligible for educational assistance, after a waiver has been applied to their account.*
> • *The department will be charged corresponding FICA tax on any taxable portion (graduate course waivers in excess of $5,250) of this educational assistance.*

It is your responsibility to ensure your understanding of these two bullets and what impact they have on your department.

D. If you have performed all actions and agree with all bullets, then select the radio button shown below, as you have no reason to deny approval of the employee's request

> ◉ Educational Assistance Request **has been** approved.

E. Fill-in the remaining red boxes (required)

Departmental Approver Title:	Tax Compliance Officer
Departmental Approver Phone:	757-221-2497

F. Select the "Sign" yellow box (shown below), at the bottom of page

Signature: [Sign ↓]	Date: 3/21/2019 | 16:03:13 EDT

G. Select signature and "ADOPT AND SIGN" - This creates your e-signature (as shown below)
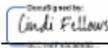
Signature: *Cindi Fellows*	Date: 3/22/2019 | 15:16:32 EDT

4. Click "FINISH"

A. 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."

> **Save a Copy of Your Document**
>
> ↓
>
> **Your document has been signed**
>
> If you would like a copy for your records, select Download or Print and save.
>
> **DOWNLOAD**   PRINT   CLOSE

B. A message will appear on the left-hand side of the green bar at the top of the screen, along with an image of your completed form (both are shown below) - This indicates, the form has been submitted and forwarded to Human Resources for review and approval. You have another opportunity to download or print a copy for your records. Otherwise, select "CLOSE."

> **Your document is now complete.**

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SECTION D: Departmental Approval

As departmental approver, I understand the following and approve this request for educational assistance:
- *The employee is eligible for educational assistance under the University policy and may apply for enrollment in the course(s) noted on this form.*
- *The Last Day to Add/Drop Classes noted by the employee has been verified and their request occurred on or before this date. If either statement is incorrect, then the request has been denied below.*
- *The department will be subject to the cost of the course if it is determined that the employee is actually not eligible for educational assistance, after a waiver has been applied to their account.*
- *The department will be charged corresponding FICA tax on any taxable portion (graduate course waivers in excess of $5,250) of this educational assistance.*

☐ Educational Assistance Request **has been** approved

☐ Educational Assistance Request **has not been** approved – Last Day to Add/Drop Classes Date is Incorrect

☐ Educational Assistance Request **has not been** approved – Submitted after the Last Day to Add/Drop Classes

☒ Educational Assistance Request **has not been** approved – **Must provide explanation in the box below**

Employee making the request is currently on leave without pay

Departmental Approver Name:	Cindi Fellows	clfellows@wm.edu
Departmental Approver Title:	Tax Compliance Officer	
Departmental Approver Phone:	757-221-2497	
Signature: *Cindi Fellows*		Date: 3/22/2019 | 15:17:53 EDT

C. A final message screen will appear (shown below) – This indicates, everything has been completed and you can close the browser.
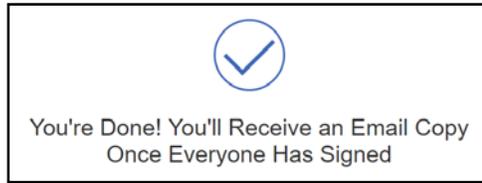
5. **Once the request has been routed to all departments, an email will be sent to you and the employee indicating the form is completed. Use the link provided in the email to access the final version of the form.**
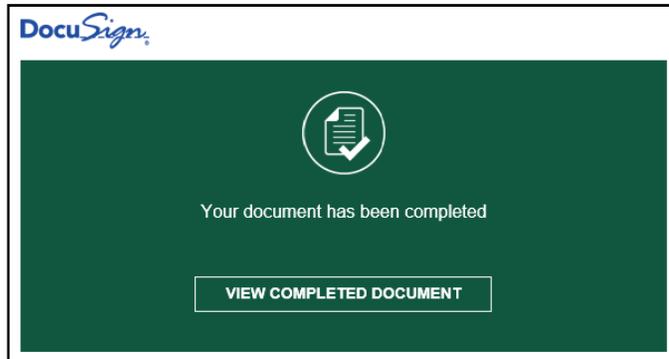
NOTE: The message in the body of the email will indicate that the form is awaiting your approval. This is a default message from DocuSign that we can only edit once. Please Ignore.

1. 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.

2. 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.

3. Otherwise, all sections will be completed, indicating the request was approved, accepted and a waiver was applied to the employee's student account.

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