Business Rules Notes for TRMS

1. Overview
2. In a year, each Employee can claim up to $1000.00 in tuition reimbursement.
3. Reset on the new year.
4. Standard reimbursements (see table ERD for types/percentages).
5. After approval, reimbursement is pending until a grade or presentation is provided.
6. Amount determined by: Available = Total ($1000) – Pending – Awarded
7. If projected is over max, adjusted to Available
8. Does NOT cover course materials (books, programs, etc)
9. Complete Reimbursement Form
10. Grading formats in reference table (Lookup Table?)
11. Presentation means that the presentation must *also* be made to management after event completion.
12. Employee provides passing grade cutoff or uses a default passing grade if specific cutoff unknown
13. Employee can provide approval email(s), skipping those approval steps
14. If form is completed less than 2 weeks prior to event/course start, request is marked urgent (affects timely manner or not?)
15. Direct Supervisor Approval
16. Can ask for more info from Employee
17. If denying, DS must provide a reason.
18. If Department Head, then DH approval automatically granted.
19. Timely fashion or auto-approved (what is timely fashion?)
20. Department Head Approval
21. Can ask for more info from Employee and/or DS.
22. Timely fashion or auto-approved (again, what is timely fashion?)
23. Does not say if DH must provide a reason for denial (yes, no?)
24. Benefits Coordinator Approval
25. Can ask for more info from Employee, DS, and/or DH
26. Approval *cannot* be skipped or obtained prior to submitting form
27. BenCo can change reimbursement amount – Employee can withdraw the request if this is done
28. If not completed in a timely manner (?), then escalation email sent to BenCo DS
29. *Can* give an Employee more than Employee’s Available Reimbursement
30. If done, then BenCo must give a reason and the reimbursement is marked as exceeding Available Funds (reporting purpose)
31. Grade/Presentation Upload
32. Employee attaches either grade or presentation to request
33. If Grade, BenCo confirms it is passing and awards
34. If Presentation, DS confirms presentation was satisfactory and presented to appropriate parties (approvers? Other management?) and awards
35. Only interested parties (Employee, DS, DH, and BenCo) can see grades/presentations
36. Additional Points