

Tuition Reimbursement Management System (TRMS)

Due: XX-XX-XX

Revature

Abstract—The purpose of the Tuition Reimbursement Management System(TRMS) is to provide a system that encourages quality knowledge growth relevant to an individual's expertise. The new TRMS design will incorporate:

- Back-End: *Java, PostgreSQL, and Servlet, etc*
- Front-End: *HTML, CSS, JavaScript, AJAX, and etc*

Outline

1. TRMS Overview
 - 1.1. Business Rules
2. Complete Tuition Reimbursement Form – Employee
 - 1.2. Business Rules
3. Direct Supervisor Approval
 - 3.1. Business Rules
4. Department Head Approval
 - 4.1. Business Rules
5. Benefits Coordinator Approval
 - 5.1. Business Rules
6. Grade/Presentation Upload
7. Additional Info
 - 7.x Roles of Participates Table

1 TRMS OVERVIEW

Currently, The Tuition Reimbursement Management System(TRMS) provides reimbursements for [Table 1](#) Events.

Problem Space – The current system relies solely on email communication, requiring manual look-ups of available funds and is error-prone due to inbox clutter and incorrect routing of tasks. Furthermore, there is no way to record and report on reimbursements awarded, and so the company has no way to identify highly-invested courses that could be developed to be offered in-house.

1.1 Business Rules

1. Each *employee* is allowed to claim up to **\$1000.00** in tuition reimbursement per year.
2. The amount available to an *employee* is reset on the new year.
3. Event types have different standard reimbursement coverage see [Table 1](#).

Table 1—Coverage per Event.

#	Event Types	Coverage	Date
1	University Courses	80%	-/-/-
2	Seminars	60%	-/-/-
3	Certification Preparation Classes	75%	-/-/-
4	Certification	100%	-/-/-
5	Technical Training	90%	-/-/-
6	Other	30%	-/-/-
7	Books	0%	-/-/-

4. After a *BenCo* has approved a reimbursement, the reimbursement is "pending" until a passing grade or presentation over the event is provided.
5. The monetary amount available for an *employee* to reimburse is defined by the following *equation*:

$$\text{Available Reimbursement} = \text{Total Reimbursement } (\$1000) - \text{Pending Reimbursements} - \text{Awarded Reimbursements}$$

6. If the projected reimbursement for an event exceeds the available reimbursement amount, it is adjusted to the amount available.
7. Reimbursements do not cover course materials such as books!

2 COMPLETE TUITION REIMBURSEMENT FORM – EMPLOYEES

1. All *employee* must complete the Tuition Reimbursement form one week prior to the start of the event.
2. This form must collect **(required)**:

Table 2—Tuition Reimbursement Form.

#	Items	Format
1	Basic Employee Information	???
2	Date	???
3	Time	???
4	Location	???
5	Description	???
6	Cost	???
7	Grading Format	perform presentation, or provide grade
8	Event Type	See Table 1
9	Work-Related Justification	???
10	Optionally: Event-Related attachments in	pdf, png, jpeg, txt, & doc
11	Attachments of approvals already provided of (Outlook Email File) type and type of approval,	.msg
12	Work Time that will be missed	???
13	The projected reimbursement	should be provided as a read-only field

2.1 Business Rules

1. Grading formats are pulled from a reference table.
2. Certain grading formats require the *employee* to perform a presentation to *Management* after the event's completion and prior to awarded reimbursement.
3. A passing grade is needed for reimbursement otherwise, *employee* must provide the passing grade cutoff for the course, or choose to use a default passing grade if unknown.
4. If an *employee* provides an approval email, that approval step is skipped (cannot skip *BenCo* Approval).
5. If the course is < 2 weeks from beginning, the request is marked urgent.

3 DIRECT SUPERVISOR – APPROVAL

1. The *Direct Supervisor* must provide approval for Tuition Reimbursement.
2. The *Direct Supervisor* can request additional information from the *employee* before approval.

3.1 Business Rules

1. If denied, the *Direct Supervisor* must provide a reason.
2. If the *Direct Supervisor* is also a *Department Head*, then the *Department Head* approval is skipped.
3. If the *Direct Supervisor* does not complete this task in a timely matter, the request is auto-approved.

4 DEPARTMENT HEAD – APPROVAL

1. The *Department Head* must provide approval for Tuition Reimbursement.
2. The *Department Head* can request additional information from the *employee* or *Direct Supervisor* before approval.

4.1 Business Rules

1. If the *Department Head* does not complete this task in a timely matter, the request is auto-approved.

5 BENEFITS COORDINATOR – APPROVAL

1. The *BenCo* must provide approval for Tuition Reimbursement.
2. The *BenCo* can request additional information from the *employee*, *Direct Supervisor*, or *Department Head* before approval.
3. This stage is not skippable for any reason!!!
4. (*)The *BenCo* has the ability to alter the reimbursement amount.

5.1 Business Rules

1. If the *BenCo* changes the reimbursement amount, the *employee* should be notified and given the option to cancel the request.
2. If the *BenCo* does not approval in a timely matter, an escalation email should be sent to the *BenCo's Direct Supervisor*.
3. (*)The *BenCo* is allowed to award an amount larger than the amount available for the *employee*.
4. (*)The *BenCo* must provide reason for this, and the reimbursement must be marked as exceeding available funds for reporting purposes.

6 GRADE/PRESENTATION UPLOAD

1. Upon completion of the event, the *employee* should attach either the Grade or Presentation as appropriate.
2. After upload of a grade, the *BenCo* must confirm that the grade is passing.
3. After upload of a presentation, the *Direct Manager* must confirm that the presentation was satisfactory and presented to the appropriate parties.
4. Upon confirmation, the amount is awarded to the requestor.

6.1 Business Rules

1. Only interested parties should be able to access the grades/presentations.
2. Interested parties include the *requestor* and *approvers*.

7 ADDITIONAL INFORMATION

7.1 Storyboards / Diagrams /Flowcharts

- Use [Trello](#) for Storyboards & place flowcharts and diagrams below if needed....

Table 3—Roles of Participates

#	Participates	Parties	Role(s)
1	Employee	Requestor	<p>[1] Must complete the Tuition Reimbursement Form.</p> <p>[2] For grading formats either perform a presentation to <i>Management</i> or provide passing grade info after event completion.</p> <p>[3] Can provide an approval email to bypass all approvals except <i>BenCo</i>.</p>
2	BenCo	Approver	<p>[1] This stage is not skipp-able for any reason!!!</p> <p>[2] Must provide approval for Tuition Reimbursement.</p> <p>[3] Can request additional information from the <i>employee</i>, <i>Direct Supervisor</i>, or <i>Department Head</i> before approval.</p> <p>[4] Has the ability to alter the reimbursement amount and should notified the <i>employee</i> of the change, and give them the option to cancel their reimbursement request.</p> <p>[5] Allowed to award an amount larger than the amount available for the <i>employee</i>, but must provide a reason for this, and the increase must be marked as exceeding available funds.</p> <p>[6] If not approved in timely matter, an escalation email should be sent to the BenCo's <i>Direct Supervisor</i>.</p>
3	Direct Supervisor	Approver	<p>[1] Must provide approval for Tuition Reimbursement.</p> <p>[2] Can request additional information from the <i>employee</i>, <i>Direct Supervisor</i>, or <i>Department Head</i> before approval.</p> <p>[3] If request is denied, must provide a reason.</p> <p>[4] If also a <i>Department Head</i>, then skipped <i>Department Head</i> approval.</p> <p>[5] If not complete in a timely matter, the request is auto-approved.</p>
4	Department Head	Approver	<p>[1] Must provide approval for Tuition Reimbursement.</p> <p>[2] Can request additional information from the <i>employee</i> or <i>Direct Supervisor</i> before approval.</p> <p>[3] If not complete in a timely matter, the request is auto-approved.</p>
5	Management	—	[1] Watches <i>employee</i> presentations
6	Direct Manager	—	[1] Confirm that the presentation was satisfactory and presents to the appropriate(approver) parties.