

# Tuition Reimbursement Management System (TRMS)

## 1 TRMS Overview

The purpose of TRMS is to provide a system that encourages quality knowledge growth relevant to an individual's expertise. Currently, TRMS provides reimbursements for university courses, seminars, certification preparation classes, certifications, and technical training. The current system relies solely on email communication, requiring manual lookups 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

Each employee is allowed to claim up to \$1000 in tuition reimbursement a year. The amount available to an employee is reset on the new year. Event types have different standard reimbursement coverage: University Courses 80%, Seminars 60%, Certification Preparation Classes 75%, Certification 100%, Technical Training 90%, Other 30%. After a BenCo (Benefits Coordinator) has approved a reimbursement, the reimbursement is pending until a passing grade. The monetary amount available for an employee to reimburse is defined by the following equation:  $\text{AvailableReimbursement} = \text{TotalReimbursement} (\$1000) - \text{PendingReimbursements} - \text{AwardedReimbursements}$ . If the projected reimbursement for an event exceeds the available reimbursement amount, it is adjusted to the amount available. Reimbursements do not cover course materials such as books.

## 2 Complete the Tuition Reimbursement Form

All Employees must complete the Tuition Reimbursement form one week prior to the start of the event. This form must collect (required): basic employee information; date, time, location, description, cost, grading format, type of event, work-related justification, and work time that will be missed. The projected reimbursement should be provided as a read-only field.

### 2.1 Business Rules

Grading formats are pulled from a reference table. A passing grade is needed for reimbursement. Employee must provide the passing grade cutoff for the course or

choose to use a default passing grade if unknown. If the course is < 2 weeks from beginning, the request is marked urgent.

## **3 Direct Supervisor Approval**

The direct supervisor must provide approval for Tuition Reimbursement. The Direct Supervisor can request additional information from the employee before approval.

### **3.1 Business Rules**

If denied, the Direct Supervisor must provide a reason. If the direct supervisor is also a department head, then the department head approval is skipped. If the direct supervisor does not complete this task in a timely matter, the request is auto-approved.

## **4 Department Head Approval**

The department head must provide approval for Tuition Reimbursement. The Department Head can request additional information from the employee or direct supervisor before approval.

### **4.1 Business Rules**

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

## **5 Benefits Coordinator Approval**

The BenCo must provide approval for Tuition Reimbursement. This stage is not skippable for any reason. The BenCo can request additional information from the employee, direct supervisor, or department head before approval. The BenCo has the ability to alter the reimbursement amount.

### **5.1 Business Rules**

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

## **6 Grade Upload**

Upon completion of the event, the employee should attach the Grade. After upload of a grade, the BenCo must confirm that the grade is passing. Upon confirmation, the amount is awarded to the requestor.

## **6.1 Business Rules**

Only interested parties should be able to access the grades/related process. Interested parties include the requestor and approvers. This means reimbursement requests not pertaining to a particular user should not be accessible or visible.