Vanderbilt University Spouse Education Assistance Tutorial



Agenda

- Getting Help / Contacting Bright Horizons
- Submitting Your Spouse's Tuition Application
- Submitting Itemized Invoice for Direct Payment
- Submitting Grades







If you have questions about your application, you have a few ways to get help from a Bright Horizons Administrator.

- Chat: For immediate assistance, access <u>Vanderbilt EdAssist Website</u> and go to Support Services, then select Get Live Help.
 - Chat hours are between 9 am 4 pm ET
- Support Ticket: Access <u>Vanderbilt EdAssist Website</u> and go to Support Services, then select to create a Support ticket.
- **Customer Support**: Call Customer Support number 844.266.1532
 - Support hours are between 8 am 8 pm ET, Monday through Friday

Submitting Your Spouse's Tuition Application



Home page

Bright Horizons. EdAssist Solutions	ducation	VANDERBILT UNIVERSITY:
Home History NEW APPL		00
+ Messages 3 New	Good Morning Welcome! To learn more about your employer's program documents in the "Using your Benefits" section of the h ready to get your education started, click "Apply Now" to APPLY NOW	ome page. When you are
Using Your Benefits	Action Needed	
UU Spouse Tuition Tutorial	APPROVED Vanderbilt University Aug 25, 2021 - Dec 15, 202	#7949333
	Upload Documents	

Please make sure to always check **Messages** for recent updates.

Under Using Your Benefits, you will find VU Spouse Tuition Tutorial

Please make sure to become familiar with requirements, deadlines, and approval process before submitting your application.



Home page

Bright Horizons Workforce E	ducation	VANDERBILT UNIVERSITY
Home History NEW APPL	ICATION	00
+ Messages 3 New	Good Morning Welcome! To learn more about your employer' documents in the "Using your Benefits" section ready to get your education started, click "App APPLY NOW	n of the home page. When you are
View Discounts from Network Schools	Action Needed	
Using Your Benefits		
■ VU Spouse Tuition Tutorial	APPROVED Vanderbilt Univer Aug 25, 2021 - D Upload Docume	ec 15, 2021

Applications that require your attention will be listed under **Action Needed**.



Start Your Application



A new application should be created for each semester or quarter.

To create and submit your spouse's application, click **New Application**.



Contact: Your Information

1 Contact	t Information 2 Programs 3	Expenses 4 Agreements 5	Review & Submit
Contac	t Information		
	Your Address		
	Use Home Address		
	To change an address please contact your employer.		
	Your Phone Number	Use Home Phone	Use Other Phone
@	Your Email Address		
	Use Work Email	O Use Home Email	Use Other Email
	tamssupport@edassist.com	tamssupport@edassist.com	
CONTIN			

The first step in the application process is to confirm your **Contact Information**.

Please select the email address where you wish to receive notifications for this application.

Please contact

tuitionbenefit@vanderbilt.edu_if changes are needed to your contact information.

Click Continue



Program: Student

Home	Education Co	aching H	istory NEW	APPLICATION		88
Contact	Information	2 Progra	ims 3 Expense	s (4) Agreements	5 Review & Submit	
New Ap	pplicatio	on				
Program	ns					
	Who is this	s application	for?		ADD DEPENDEN	IT OR SPOUSE
	Student					
	Select		~			
CONTIN	IUE Can	cel				

In the second step of the application, **Programs**, you will select information regarding the purpose of the application.

Begin by selecting your spouse in the **Student** drop-down.

Click Continue



Programs: Add New Spouse

Home Education C	Coaching History	NEW APPLICATION		8
Contact Information	2 Programs 3	Expenses (4) Agreement	s 5 Review & Submit	
		Expenses Agreement		
New Applicat	ion			
Programs				
g.				
Who is t	his application for?		ADD	DEPENDENT OR SPOUSE
Student				_
Select	Family Member		×	
	Relationship Type			
CONTINUE	Spouse 🗸			
	First Name	Last Name	Date of Birth	
	Spouse First Name	Spouse Last Name	01/01/1976	
	I attest that the above dependent ad spouse by legal marriage.	ded is eligible to be claimed as a deper	ndent on my Federal tax return or is my	
	l agree			
	SAVE			

If you do not see your spouse listed under Student, you can add them to the application by clicking Add Dependent OR Spouse

When prompted, select **Spouse** for the *Relationship Type*.

Enter your spouse's *First Name*, *Last Name*, and *Date of Birth*.

Select **I agree** after you have read the spouse certification of eligibility clause.

Click **Save** to add your spouse.



Programs: Selecting Your Spouse

Contact Information	2 Programs	3 Expenses	4 Agreement	s 5 Review	& Submit			
New Application								
Programs								
Who is th	is application for?				ADD DEPENDENT OR SPOUSE			
Student								
Select		~						
You								
CONTINUI Spouse								
Depende	ent							
Depende	ent							
Depende	ent	olutions LL(C All Rights Reserved	Terms & Conditions	Privacy Policy			

Your added spouse will appear under the **Student** drop-down. Select your spouse name to add them to the application.

Click Continue



Programs: Education Objective

Contact Inf	iormation 2 Programs	Expenses 4 Agreemen	ts 5 Review	& Submit			
New App	New Application						
Programs	;						
۱	Who is this application for?			ADD DEPENDENT OR SPOUSE			
	Spouse V	•					
	What is your education objective? Select both fields below to identify educe	ation objectives.					
	Education Program						
	Select 🗸						
CONTINUE	Bachelor's Degree Doctorate Degree						
	Juris Doctor (J.D.)						
	Master's Degree						
	Professional Degree	olutions LLC All Rights Reserved	Terms & Conditions	Privacy Policy			

Next, you will be prompted to determine your spouse's education objective.

Select the degree type from the following options available:

- Bachelor's Degree
- Doctorate Degree
- Juris Doctor (J.D.)
- Master's Degree
- Professional Degree

Click Continue



Programs: Program Selection

0 🛇	ontact Information 2 Programs 3 Expenses 4 Agreements 5 Review & Submit
New	/ Application
Pro	grams
	ADD DEPENDENT OR SPOUS
	Student V
æ	What is your education objective? Select both fields below to identify education objectives. Education Program Master's Degree
	What Program would you like to use?
	 Staff attending Vanderbilt (ineligible) Staff attending another University (ineligible) Spouse of Staff attending Vanderbilt DEP attending Vanderbilt Uni hired before 9/1/12 (ineligible) DEP attending Another UNIV hired before 9/1/12 (ineligible)

Based on your eligibility, you will choose a spouse program available to you under **What Program would you like to use?**

Faculty

• Spouse of Faculty attending Vanderbilt

<u>Staff</u>

• Spouse of Staff attending Vanderbilt

Once you have selected your spouse program for this application, click **Continue**



Program: Education Provider

Who is your Education Provider?			✓ Edit
Name	Studer	nt ID (Optional)	
Vanderbilt University	using the Name field below.	hool accepted under this program. Search fo	r and select Vanderbilt University
Address	Name (Optional) Vanderbilt University		
PMB 401671 2301 Vanderbilt Place Nashville, TN 37240	Narrow results or search based on location or City (Optional)		Country (Optional)
		Select 🗸	Q
	Accreditation (Optional) Select Network schools offered by your sectors of the sector	bur employer that provide tuition discounts a	nd/or other benefits.
	Name	Address	Network School (Discounts & Other Benefits)
	Vanderbilt University	PMB 401671, 2301 Vanderbilt Place, Nashville, TN	No
	Vanderbilt University	OGSM Executive Programs, 40 21st Ave South, Nashville, TN	1 No

You will be prompted to search and select the **Education Provider** for your spouse.

The search may return the same school name with different addresses. Please make sure to select the first entry for Vanderbilt University.



Program: Education Provider

Please Make a Selection*		
🔵 Faculty attending Vanderbilt (ineligible) 🛛 🗧		
C Faculty attending another University (ineligible	2) 🚍	
Spouse of Faculty attending Vanderbilt		
DEP attending Vanderbilt Uni hired before 9/1	/12 (ineligible) 🗧	
DEP attending Another UNIV hired before 9/1/	12 (ineligible) 🗧	
Who is your Education Provider? Name Vanderbilt University	Student ID (Optional)	✓ Edit
Address PMB 401671 2301 Vanderbilt Place		
	Faculty attending Vanderbilt (ineligible) Faculty attending another University (ineligible) Spouse of Faculty attending Vanderbilt DEP attending Vanderbilt Uni hired before 9/1/ DEP attending Another UNIV hired before 9/1/ Who is your Education Provider? Name Vanderbilt University Address PMB 401671	Faculty attending Vanderbilt (ineligible) Faculty attending another University (ineligible) Faculty attending vanderbilt Faculty attending Another UNIV hired before Vanderbilt University

Once you have selected your education provider, review your application before continuing to the next step.

When ready click **Continue**.



Expenses: Session Information

Contact	t Information 🔗 Programs ③ Ex	penses 4 Agreements 5 Rev	riew & Submit
New A	pplication		
Expens	es		
	Session Information		
		nesters(2) or Quarters(4). ition amount for the term up to Vanderbilt's st ur course per semester or 3 courses per acade	
	Academic Calendar Select	Term Select	Credits
	Session Start Date	Session End Date	
	What are the total expenses for this s Total Expenses Amount \$ Example: 100.00	ession?	
CONTI	NUE		

Under **Expenses**, you will enter the session information for the education provider your spouse will attend.

Note: Spouse benefit allows one 3 credit hour course per semester, with a limit of 3 courses per academic year.



Expenses: Total Expenses

Contact Information Programs 3 Expense 5 Review & Submit **New Application** Expenses 图 Session Information In the Term Schedule field, select either Semesters(2) or Ouarters(4). In the Tuition Amount field, enter the full tuition amount for the term up to Vanderbilt's standard tuition for the same term. Note: Spouse benefit allows one 3 credit hour course per semester or 3 courses per academic year. Academic Calendar Term Credits Select × Select × Session Start Date Session End Date m Ê MM/DD/YYYY MM/DD/YYYY

What are the total expenses for this session?

Total Expenses Amount

S Example: 100.00

CONTINUE
Cancel

Under **Total Expenses Amount**, enter the total tuition amount for the course.

Note that the benefit contributes only to tuition. Mandatory fees, registration fees, books, room and board, and any other expenses are not eligible.

Please refer to the Vanderbilt University's Employee Education Assistance Policy and FAQs for full details.

Click Continue



Expenses: Course Summary

<u> </u>	pplication Programs	3 Expenses	4 Agreements 5	Review & Submit	
	Session Information				
	Session Start Date	Session E	nd Date		
	@ 08/23/2021	12	/14/2021		
	Are you graduating or complet	ing your education prog	ram with this session?		
	🔿 Yes 📃 No				
E	Expected Completion Date (Opt		INC101)		
		Amount \$1,500.00	Related Expenses	Tax Exempt YES	Credit Hours 3
	Maximum number of courses reached	Edit	~		Total: \$1,500.00
CONTIN					

Your spouse's course will appear under the **Course & Expense Information** section.

Click **Continue**.



Agreements: Confirm and Sign Application

Contact	Information 🔗 Programs 🔗 Expenses 🕢 Agreements ⁵ Review & Submit
ew Ap	pplication
Agreem	ents
	Did you receive any grants, scholarships, or discounts?
`	• Yes O No
	Scholarship/Grant Type (Optional) Amount State Grant \$ 5000.00
	Agreements
	Participation Agreement
	I have read and understand the terms and conditions set forth in the Vanderbilt University Tuition Assistance Policy. As a condition of participating in this program, I agree to abide by these terms and conditions. I understand that my participation in this program is not a condition of my employment or continuation thereof. I further understand that grades or other evidence of satisfactory completion, as well as an itemized invoice for all expenses must be provided.
	I affirm that any documentation I have submitted in connection with this program is complete and accurate. I acknowledge that if I knowingly submit false, deceptive or misleading information in order to receive benefits under the program, this may result in adverse tax consequences and discontinuance in my tuition assistance.
	I agree

The Family Educational Rights and Privacy Act of 1974, as amended (FERPA) ensures students of the right to privacy and confidentiality with respect to their educational records and limits access to the information contained in those records. Under FERPA, you have the right to denv authorization to release your educational records. However, in order to receive tuition assistance

FERPA Agreement

In the **Agreements** section, you will have the opportunity to enter financial assistance received, agreements, and sign the application.

Start by indicating if your spouse will receive any financial assistance. Enter the type of Scholarship/Grant followed by the Amount.



Agreements: Confirm and Sign Application

	Scholarship/Grant Type (Optional) Amount
	State Grant \$ 5000.00
)	Agreements
	Participation Agreement
	I have read and understand the terms and conditions set forth in the Vanderbilt Univer. Utition,, ce Policy. As a condition of participating in this program, I agree to abide by these terms and coperation of the program is not a condition of my employment or continuation thereof. I further unit stand the value of satisfactory completion, as well as an itemized invoice for all expenses must be a defined of the value of the valu
	I affirm that any documentation I have submitted in connection with t. togram is d plete and accurate. I acknowledge that if I knowingly submit false, deceptive or misleading information entry to a beneficial adverse tax consequences and discontinuance in my to a size the second discontinuance discontinuance in my to a size the second discontinuance disco
	FERPA Agreement
	The For educational Rights an rivacy 1 or 1974, as amended (FERPA) ensures students of the right to privacy and confirm allity with respect to the ducational records and limits access to the information contained in those records. Under FERF you have the deny diate to receive tuition assistance through the deny diate to receive and share your educational records. However, in order to receive tuition assistance through a gree as the way agree as the second share your educational records with your employer. By checking "I Agree", a gree as the way agree as the second share your educational records with your employer. By checking "I Agree", and agree as the second share your educational records with your employer.
	Educational institution chools, agencies or individuals holding my educational records may release such records to EdAssist
	If you do not agree with the above terms, please understand that we will be unable to process your tuition assistance application,

Read each agreement carefully and select **I agree**.



Agreements: Confirm and Sign Application

Scholarship/Grant Type (Optional) Amount	
State Grant 🖌 \$ 5000.00	0
Agreements	
Participation Agreement	
I have read and understand the terms and conditions set fo of participating in this program, I agree to abide by these te not a condition of my employment or continuation thereof. I completion, as well as an itemized invoice for all expenses r	erms and conditions. I understand hat my hat my hipatily this program is further understand that grand other evide to fisc actory
I affirm that any documentation I have submitted in connect knowingly submit false, deceptive or misleading information adverse tax consequences and discontinuance in my tuition	n in order to receivene. Inder the state of this may result in
FERPA Agreement	Your Name:
The Family Educational Rig and Privacy Act of 1974 confidentiality with respect their education ords FERPA, you have the right environment of the second through EdAssist, it is neces. Assist to reverse the second	Enter your name exactly as it appears above.
Educational institutions, school agenciandiv EdAssist.	
 EdAssist may release my educational records (what to my employer. 	To accept agreement (a), you must type your name exactly as it appears
 This consent shall remain in effect until I submit a 	
If you do not agree with the above terms, please unders	CONTINUE Concel

At the bottom of the page, you will have the opportunity to electronically sign the application you are submitting for your spouse.

Sign your application exactly as it appears in bold.

Click Continue



Sample Detailed Itemized Invoice



- Credit card and e-check payments may be made online by going to <u>https://my.ucf.edu</u>. Click on Student Self Service>Student Accounts>View Your Account (or Fee Invoice)>Due Charges/EPay.
- You may also mail your check to: University of Central Florida; Student Account Services, ATTN: Payment Processing; PO Box 160115; Orlando FL 32816-0115
- A late payment fee of \$100.00 applies to students who do not pay their fees or do not pay their fees by the payment deadline.

For more information on fee payment procedures, go to our website at www.studentaccounts.ucf.edu.

Although great care was used in calculating your fees, payments, estimated financial aid, deferrals, waivers and other data contained on the invoice, occasionally errors do occur. The university reserves the right to verify and make corrections to any information on this invoice without notice. Itemized Invoice should contain at a minimum the following information for approval:

- School name, Logo or URL
- Student Full Name
- Course names and term information (Example: Term: Spring 2022)

Tuition amounts:

 List of itemized detail of tuition and fees for the term

Please note: Not all invoices or term bills will include course information. In this case, a term schedule that includes all your term courses will need to be submitted.



Submitting Your Itemized Invoice

Home	Education Coaching History New Application
	Agreements Grants, Scholarships & Discounts None \$0.00
Additi	Onal Information Supporting Documentation • Please upload completion documentation. Only one Document Type can be selected at a time. Acceptable document formats are .pdf, jpg, jpeg, and .png. File size limit is 3 MB.
	Drag and drop a file here, or click to select one from your computer. This application currently has no supporting documentation.
Submit	Application Delete

To submit your itemized invoice:

Click to **Drag and drop a file or click** to **Select One from your computer** to upload your itemized invoice.



Uploading Itemized Invoice

Home Education Coaching	History New Application
Grants, Scholarships & D None \$0.00	iscounts
Additional Information	Home Education Coaching History New Application
Supporting Docu Please upload comp .pdf, jpg, jpeg, and	Additional Information Supporting Documentation Please upload completion documentation. Only one Document Type can be selected at a time. Acceptable document formats are pdf. jpg. jpeg. and .png. File size limit is 3 MB.
This application cur	The file invoice.pdf is ready to upload. The file will not upload until Submit Document button is clicked Document Type * Select Corrections
Submit Application Delet	Grades Invoice Submit Document Cancel
	This application currently has no supporting documentation.

You will be prompted to select the **Document Type** from either Corrections, Grades, or Invoice

Select Invoice



Submitting Your Invoice

	Supporting Documo	ntation *		What documor	nt types are supported?	=
U	Supporting Docume					
-	Please upload completic .pdf, .jpg, .jpeg, and .png		one Document Type can) be selected at a time. A	Acceptable document form	ats are
	1					
	(
	📎 Drag and drop	a file here, or click to	select one from your co	omputer.		
				i		
	INVOICE	invoice.pdf				圃
		From	Uploaded	Status	Date Reviewed	
			5/16/22	Pending	N/A	

Once you have uploaded your invoice, it will reflect as uploaded in the **Supporting Documents** section.

Next you will need to submit your application.



Review: Submit Application

Workforce Educat	ion					
	Home	History New Application				
	1 Contact	Information 2 Programs	3 Expenses	4 Agreements	5 Review & Submit	
	* = Required IMPORT other so any find separat for each	ANT: In order to receive your ANT: In order to receive your hool official document that in Incial aid received. If the invoi e school official document the o course. Your payment will b plication is approved, and ac	ncludes tuition ice does not in at includes all e processed or	and fees for the clude a term sch courses in the te n the next availa	term, term schedu edule, we will requ rm with credit hou ble payroll cycle as	e and ire a 's shown
		Contact Information Address 465 21st Avenue South Medical Research Building 3 Nashville-Davidson, TN 37235	Email tamssupport@eda	ssist.com		✓ Edit
		Programs Employee Program Faculty attending Vanderbilt 🗧		Education Program Bachelor's Degree		✓ Edit

The final step in your spouse's application is to review the application before submission.

Once your application is approved and acceptable documentation uploaded, you will receive a direct payment on your next available payroll cycle. Therefore, it is advised to submit your application and itemized invoice as soon as possible to expedite your payment.



Review: Submit Application

Contact	Information 🔗 Programs	s 🔗 Expenses 🔗 Agree	ements 5 Review & Subm	it			
	Education Provider Name Vanderbilt University Address PMB 401671 2301 Vanderbilt Place Nashville, TN 37240	Provider Code 221999					
æ	Expenses Session Dates Aug 23, 2021 - Dec 14, 2021		Completion Date Dec 15, 2023		Edit		
	COURSE	Intro to Finance (FINC101) Credits Tax Exempt 3 Yes	Grade NA	Verified N/A			
		View More		Requested \$1,500	.00		
	TOTALS		Tuition application # 782426 Your application h		ł		
			This application has met init registration, the school will b the process, please access a your education pravider.	ill Bright Horizons directly	for approved	coursework and exp	enses. To complete
	Agreements Grants, Scholarships & Disc State Grant \$5,000.00	Return to Home Page	Log Out				
	PPLICATION Delete						

When ready, click **Submit Application** at the bottom of the page.

You will receive a confirmation message that you have submitted the application and you will be given an application number.

Your application will have a status of **Approved.**





Upon satisfactory completion of the course, you must submit your spouse's grades no later than 30 days after the course end date.

Failure to provide appropriate documentation of your spouse's passing grade, **may result in disqualification** for future benefits under this benefit and/or the obligation to return any benefit paid, which may include payroll deduction to recoup the benefit.

Sample Transcript for Grades



Status Waitlist Priority	I I	Course Detail Information	Fin E	Gra	Meeting	Date (MM/DD)	Days	Time	Location	Room
RW	i lis	Sender, Re and		A	Lecture	06/16 · 12/11	M		Social Sciences Bidg	3026
	2	Sat Hk. 4 Campus Part of Terms F	D							
		d Lawn	1					L	L	1

Fall Semoste	r 20 <u>13 Tuiti</u>	on and Fees
Charges	Credits	Balance
\$1,354.90	\$1,354.90	\$.00

RELEASE: 8.3.0.3

Grade reports/transcripts should contain the following:

- School letterhead / information
- Studentname
- Coursename
- Grade received



Submitting Grades

Bright Horizons. Workforce I	Education	VANDERBILT UNIVERSITY:
Home History NEW APP	LICATION	00
+ Messages 3 New	Good Morning Welcome! To learn more about your employer documents in the "Using your Benefits" sectio ready to get your education started, click "Ap	on of the home page. When you are
View Discounts from Network Schools	Action Needed	
Using Your Benefits Vanderbilt University Education Assistance Tutorial	APPROVED	#7949333 <mark>•</mark>
	Vanderbilt Unive Aug 25, 2021 - E	
P	Upload Docum	ients

- Go to Action Needed section of the Home page.
- Click Upload Documents to upload your spouse's grade report/transcript.

NOTE: You can also upload documents by going through **History** and clicking on the application number.



Uploading Your Grades

Suppor	ting Documentation	What document types are supported? 🚍
	pload completion documentation. Only one Document g, and .png. File size limit is 3 MB.	Type can be selected at a time. Acceptable document formats are .pd

In the Supporting Documentation section, select to either drag the document to that location or **Select File**



Uploading Your Grades

APPROVED		Employee		
	Home	Education Coaching History New Applic	ation	
D	* = Required	Supporting Documentation * Please upload completion documentation. Only one Docu j.ga, j.peg, and .png. File size limit is 3 MB.	What document types are supported? 🚍 ment Type can be selected at a time. Acceptable document formats are .pdf,	:d? 🗐 ts are .pd
		The file grades.PNG is ready to upload. The file	will not upload until Submit	
		다 Document button is clicked.		
		Document Type *		
		Undes •		
		Corrections	Grade *	
		Grades	Grade * Select	

You will be prompted to select the **Document Type** from either corrections, grades, or Invoice.

Select Grades



Confirming Your Grades

Education Coaching History **New Application** Home * = Required Supporting Documentation * What document types are supported? 🚍 Please upload completion documentation. Only one Document Type can be selected at a time. Acceptable document formats are .pdf, .jpg, .jpeg, and .png. File size limit is 3 MB. The file grades.PNG is ready to upload. The file will not upload until Submit I. Document button is clicked. Document Type * Grades × Course Name Grade * math A+ \mathbf{v} Comment (Optional) Optional Submit Document Cancel

For each course, select the **Grade** that matches your spouse's grade report/transcript you uploaded.

Add a comment if needed and click **Submit Documents**.



Document Status

Home	Education Coaching	History New A	Application					
* = Required								
(目)	Supporting Documer	ntation *	What docum	What document types are supported? 🔚				
U	Please upload completion documentation. Only one Document Type can be selected at a time. Acceptable document formats are .pdf, .jpgjpeg, and .png. File size limit is 3 MB.							
	GRADES	grades.PNG				<u>ش</u>		
		From	Uploaded	Status	Date Reviewed			
			5/16/22	Pending	N/A			

After submitting your spouse's grades, your **application status history** will reflect the status of your uploaded documents.

If additional information is needed, you will be notified by Bright Horizons via email.



Thank You!

Access <u>Vanderbilt University EdAssist</u> Website Get Live Help via chat between 9 am - 4 pm ET Submit a Support Ticket Customer Support 844-266-1532 between 8 am – 8 pm ET (M-F)



