

Education Benefit Substantiation-FAQ

This document outlines the required documentation for substantiating education benefits, for both advance funding and reimbursement requests.

Reimbursement

If your request was for reimbursement:

- This means the program has been completed and paid for.
- Required documents should be included when making the initial request.

Advance Funding

If your request was for advance funds:

- This means funds were issued to you before the program was completed.
- Required documentation should be provided within 30 days of completion.
 - If unable to submit within 30 days, please email askhr@virginia.edu
 - If your program has been completed sooner than expected, please email askhr@virginia.edu
 - If you receive the substantiation task but do not have all documents gathered for submission, please wait until you have all required documents before submitting the substantiation task to HR for review.

Required Documentation

- **Proof of payment is required for all requests.**
 - **An itemized (or breakdown) statement should be included**
- Proof of completion/grades are required for all items (minus those listed with “N/A” in the chart below).
- There is a maximum of 5 documents that can be uploaded at a time, if you have more than 5 documents please merge into 1 document and submit.
 - This can be done by merging PDF’s or screenshots in a Word document.

See the chart below for examples of acceptable documentation for the most common requests. Items with a checkmark indicate it is required, some programs have further clarification in lieu of a checkmark.

Not sure what to provide? Please contact askhr@virginia.edu for more information.

Program Type	Proof of Payment/Itemized Statement	Proof of completion
Degree Program	✓	Copy of final grades
For-credit certificate program (ACD Only)	✓	Copy of final grades or certificate of completion
Conference/Webinar/Seminar (ACD Only)	✓	N/A
ESL Course	✓	Certificate of completion

Certification/Renewal (MC Only)	✓	Copy of certification/renewal
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Commonly Asked Questions

- ***I submitted my substantiation task; it is still under review with HR; when will I receive my funds?***
 - *In this case, the funds were issued to you upfront. You can navigate to your benefits & pay hub>bonus & one-time payment history to see amounts and dates funds were issued.*
- ***Since my substantiation task is still under review with HR, does that impact my ability to receive funds in the future?***
 - *HR will review when available. If more information is needed the substantiation task will be sent back with a comment. The substantiation task must be resolved before additional funds may be issued.*
- ***My program ended earlier than I had expected, what can I do?***
 - *Please email askhr@virginia.edu for assistance.*
- ***I used a student loan for my program, how is that handled for substantiation?***
 - *Please provide an itemized statement from your school showing the loan was dispersed.*
- ***I received a scholarship/grant for my program how is that handled for substantiation?***
 - *In this instance, the amount of the grant/scholarship needs to be removed from the total tuition cost. Any amount not covered by those funds are allowed to be covered by education benefit funds.*
- ***I received the inbox task, but my documents are not available yet, should I submit the documents I do have?***
 - *No, employees have 30 days from the provided end date to submit their substantiation task. Please wait until you have all required documents before submitting.*
- ***I received a notice that because I included an ineligible expense with my request, I have to return that amount.***
 - *Ineligible expenses identified during the substantiation review will require repayment. No additional funds may be issued until the repayment has been completed.*