

Onbase access to Educational Assistance Form:

## Logging on:

<https://reqs.lcfpd.org/AppNet/Login.aspx>

(Or Go to Fern and click on Software links at the top

<https://www.lcfpd.org/fern/software-links/>

Either option gets you to this logon



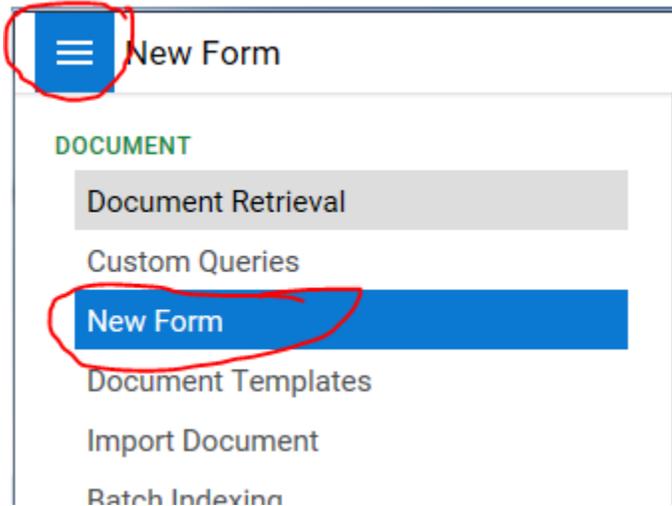
The screenshot shows a web browser window with the address bar displaying <https://reqs.lcfpd.org/AppNet/Login.aspx>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar also shows several tabs: Login, Suggested Sites, Preserves & Facilities, Rec..., OnBase 17.0.1.73 [Product..., and BlueCross. The main content area features a large, colorful circular graphic on the left and the OnBase 17 logo on the right. Below the logo, there are three input fields: the first is labeled 'LCFPD' and contains the text 'LCFPD'; the second is a yellow field; and the third is labeled 'Password'. A blue 'Login' button is positioned below these fields.

Logon using your 1<sup>st</sup> intial last name (i.e. jsmith).

The password is your network password.

## Creating the New Form:

1. Once logged on please click the 3 bars at the top and select New Form



2. From the Forms Menu – Select Education Assistance

A screenshot of the OnBase 'Educational Assistance' form. The form is titled 'Educational Assistance' and is displayed in a web browser. The browser's address bar shows 'New Form' and the OnBase logo is visible in the top right corner. The form is divided into several sections: 'Employee Information', 'Dates and Location', 'Travel Costs', and 'Expenditure Code'. The 'Employee Information' section includes fields for 'First Name\*', 'Last Name\*', 'Department\*', 'Job Title\*', and 'Email Address\*'. The 'Dates and Location' section includes fields for 'From:\*', 'To:\*', and 'Location\*'. The 'Travel Costs' section includes a table with columns for 'Description' and 'Estimated', and rows for 'Registration Fee\*', 'Airfare\*', 'Lodging Total\*', 'Cost Per Night', '# of Nights', and 'Mileage'. The 'Expenditure Code' section includes fields for 'Organization\*', 'Object\*', and 'Amount\*'. There are also checkboxes for 'Travel Advance Requested' and a 'Date Needed' field. A note at the bottom states: '\* If amounts exceed the below the request will need to go to board: Registration Fee above \$2,000'. The left sidebar shows a search bar and a list of forms, with 'Educational Assistance' selected.

'\*' Is a required field. Fill out the form as you would normally the paper form.

3. Scroll down until you get to your signature and date.

https://reqs.icfpd.org/ - OnBase 17.0.1.73 - Internet Explorer

New Form

OnBase

Julie Lamarre

Forms

FORMS

- ✓ Educational Assistance

HR-HUMAN RESOURCES

- HR Action
- HR Seasonal/Temp Separation

\*\*explain other costs

I have read and understand Personnel Policy and Procedure 3.6 – Education Assistance. I will submit all necessary documentation required for reimbursement within 5 working days after my return from travel.

Educational Assistance Form Procedures:

1. The employee completes the **Education Assistance and Payment Request Form** and submits it to the Department Director for approval along with a completed registration form.
2. Reimbursements in excess of the maximum Eligible Travel Expenses established in the Reimbursement of Travel, Meal and Lodging Expenses Policy must be approved by the District Board.
3. The Department Director reviews the request for proper account coding and the availability of funds. If \$100 or more, the Department Director forwards the request to the Executive Director for approval. After approval, the form is forwarded to the Accounting Department. Accounting distributes the a copy and will mail a payment along with any registration form unless directed otherwise.
4. The employee may register themselves after receiving their approval. The approved document must be used to fill out the **Actual Amount** incurred to submit to accounting for expense reimbursement
5. The employee must obtain their own hotel reservation and airplane tickets. To pay in advance for lodging expenses, the employee must complete the **Payment Request Form**.
6. The employee may request a cash advance for hotel, airfare, meals and other related expenses by completing the **Travel Advance Request** section on the form.
7. Within five(5) working days of return from travel or after an actual expense has incurred, the employee must complete the **Actual Amount** expense, plus a check made payable to the district for any unused cash advance. If mileage reimbursement is being claimed, back up from a mapping system confirming miles traveled must be submitted.

The **Educational Assistance Form** that needs immediate attention must be submitted to Accounting at least seven (7) working days prior to scheduled disbursement date. Disbursements are made approximately every week on Friday.

REQUIRED CONTINUING ED      Employee Signature \*      Date: \*

Certification/License

Click to Sign Document

Submit

Approved By:

Department Director Signature      Department Director Date

4. Click on the signature and sign it using your mouse and then click the Apply Signature button

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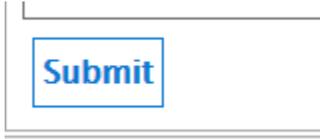
REQUIRED CONTINUING ED      Employee Signature \*      Date: \*

Certification/License

Apply Signature      Clear

Submit

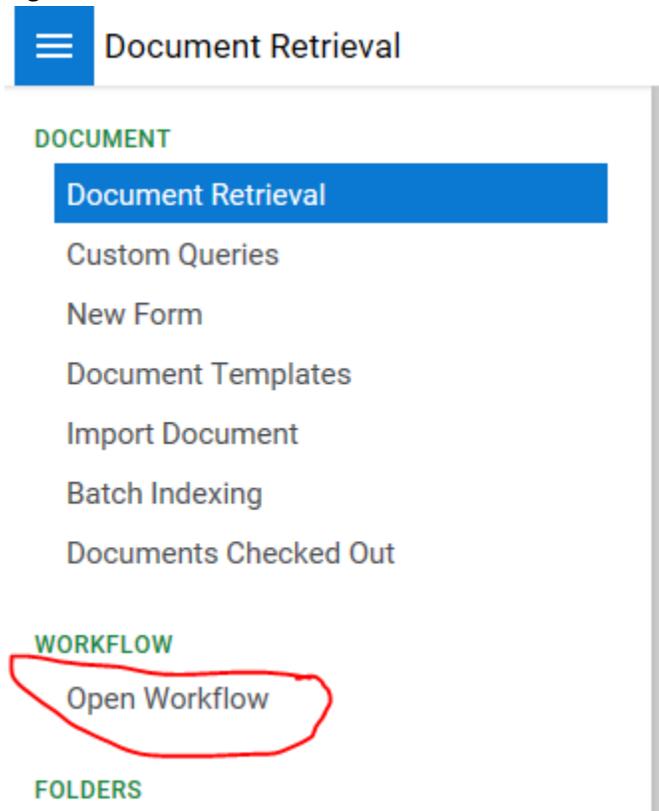
5. The final step to getting the form into the 'workflow' is to click the submit button under your signature.



This will start the routing process to your approving Director.

## Approval Process:

1. Once the form is approved by your director
2. If the amount is over \$100 it will then route to the Executive Director.
3. Once approved by your director (and if necessary Executive Director) your form will route to Finance Director.
4. After Finance Approves the Form. It is routed back to you in your workflow queue. Where you will be prompted to fill out your actual costs and upload your receipts.
5. Go to the website and logon as yourself Refer back to the top of the page if you forgot how to logon.

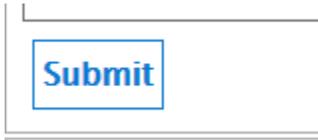


- 6.

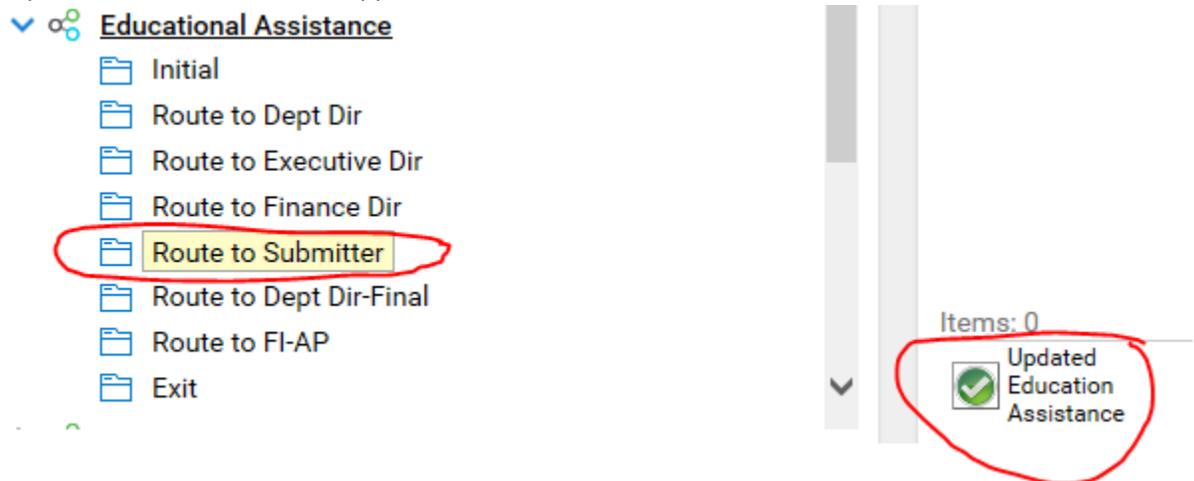
Travel Costs			Expenditure Code <span style="float: right;">Add</span>		
Description	Estimated	Actual	Organization*	Object*	Amount*
Registration Fee*	\$1,500.00		002000120215844	40250540001	\$1,500.00 <span style="float: right;">Remove</span>
Airfare*			If Travel Advance is Requested a Check Request Form must be filled out.		
Lodging Total*	0		<input type="checkbox"/> Travel Advance Requested		
Cost Per Night			Date Needed		
# of Nights					
Mileage			* If amounts exceed the below the request will need to go to board:		
Cost per Mile	0.00		Registration Fee above \$2,000		
Estimated Miles			Airfare above \$500.00 (plus tax, fees and 1 bag)		
Meals*			Lodging above \$250 (plus tax and resort fees)		
Number of Meals not provided by			Meals above \$60.00 per day (plus tax, tip)		
Hotel/Conference			<b>Attached Document</b>		
Other**			Upload Receipts		
Total Cost	1500.00	0.00	<span style="border: 1px solid black; padding: 2px;">Upload Receipts</span>		
**Explain other costs					

Fill out the actual costs and scan and upload your receipts.

- You will need to click the submit button at the bottom of the page. This will save the form with the updates you just performed with your actuals and receipts.



- After you click the submit button you need to Approve the updates so it will route back to your department director for final approval.



- Your form will then be routed back to your department director. You will receive an email once it has been finalized.