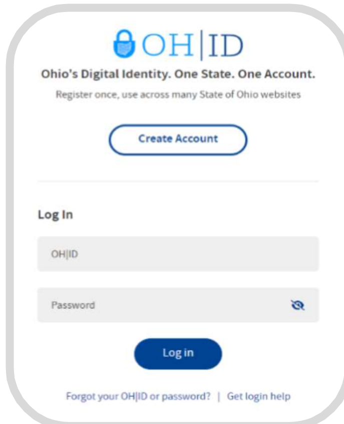
Department of Administrative Services

Employee Development Fund

Entering a Request for Reimbursement

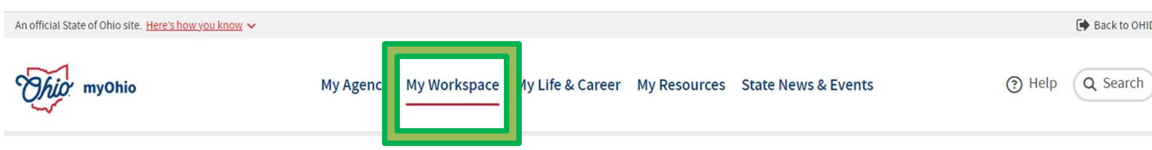
Step 1: Log Into MyOhio

Sign into **myOhio.gov**:



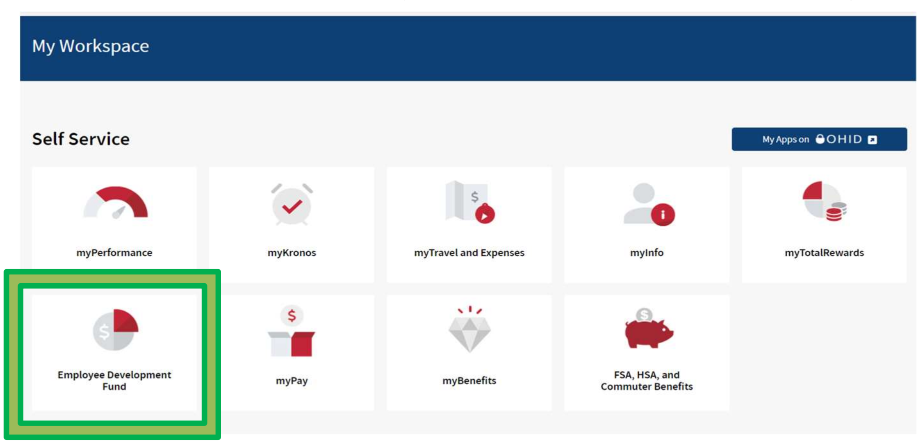
Step 2: Navigate MyOhio

From the landing page, select the "My Workspace" menu:



Step 3: Tour of the EDF Reimbursement Request Tool

From the My Workspace page, scroll to find the Employee Development Fund tile. Click the tile to open the Employee Development Fund Req page.



Employee Development Fund

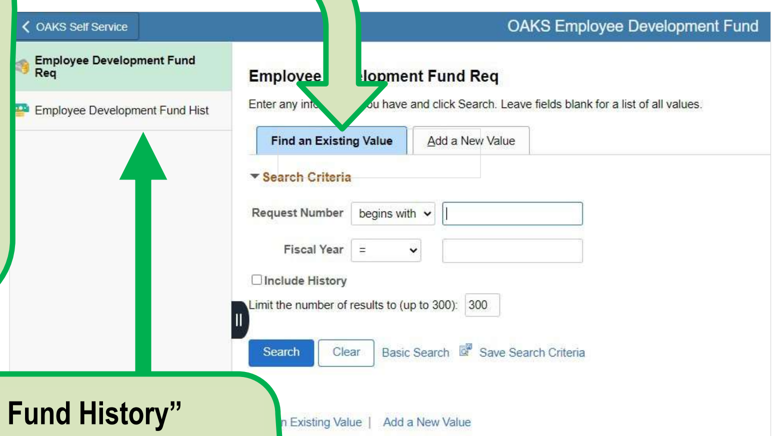
Entering a Request for Reimbursement

The Employee Development Fund's reimbursement request form appears on this page.

Note = the form automatically opens on the "Find an Existing Value" tab so it's convenient to find requests you've previously submitted.

The **"Find an Existing Value"** tab provides you access to the requests you previously entered and which a Request Number has been assigned (except for Requests that currently have a "Submitted" status).

- Narrow your results by entering the year
- Click the **Search** button



"Employee Development Fund History" accessed from the left of the page provides another way to see both your history & Requests which are in a "Submitted" status and are not editable.

Step 4: Add a New EDF Reimbursement Request

To enter a new request, click on the **Add a New Value** tab.

- The Request Number, Employee ID, and Union Code will automatically populate
- Next, click the "Add" button to enter a new request.

The Employee Development Fund Req page is organized into three sections:

- Section 1: Employee Info (Step 5)
- Section 2: Course Information (Step 6)
- Section 3: Instructions for Attachments (Step 7)

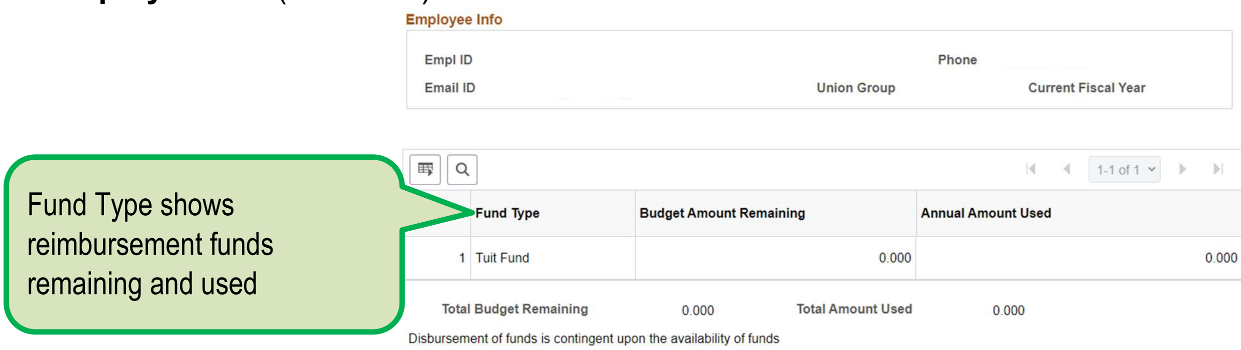
Use this form to enter all relevant information regarding your reimbursement request.

Employee Development Fund

Entering a Request for Reimbursement

Step 5: Review Your EDF Budget Amount

Employee Info (Section 1) – this section is auto-filled. No action is needed



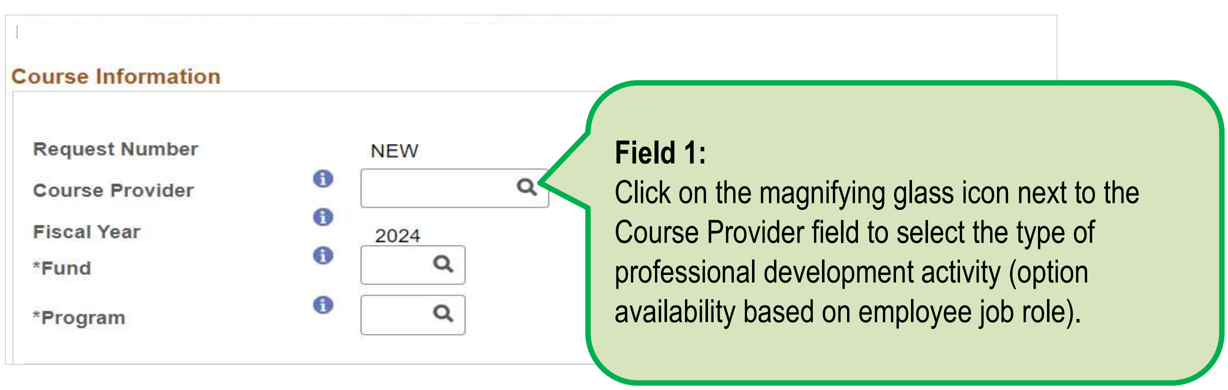
Step 6: Provide the Details of Your Reimbursement Request

Course Information (Section 2) – includes 9 fields to complete:

- Field 1: Course Provider
- Field 2: Fund
- Field 3: Program
- Field 4: Course Name
- Field 5: Begin Date
- Field 6: End Date
- Field 7: Course Amount
- Field 8: Grants/Scholarships
- Field 9: Requestor Comment

    Approver Comment – no action needed; for administrative use.

- **Field 1: Course Provider**



Employee Development Fund

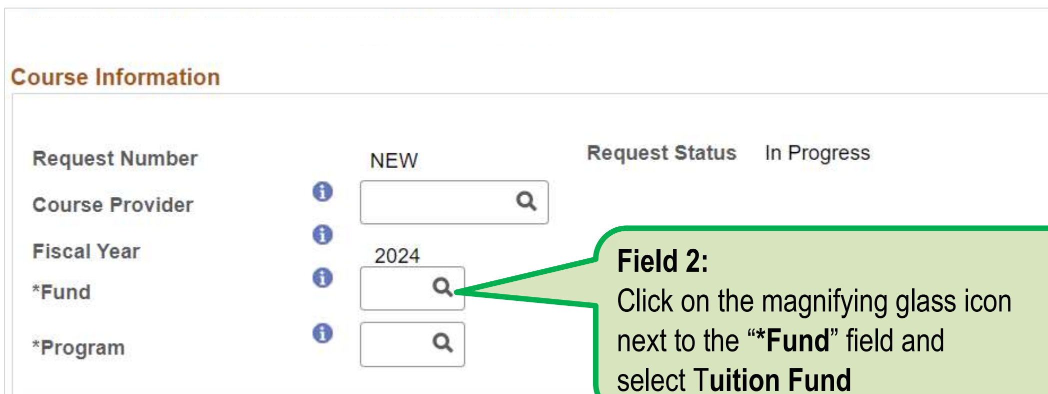
Entering a Request for Reimbursement

Field 1: Course Provider, cont.

Click on the category that applies to the type of reimbursement request; options based on job role.

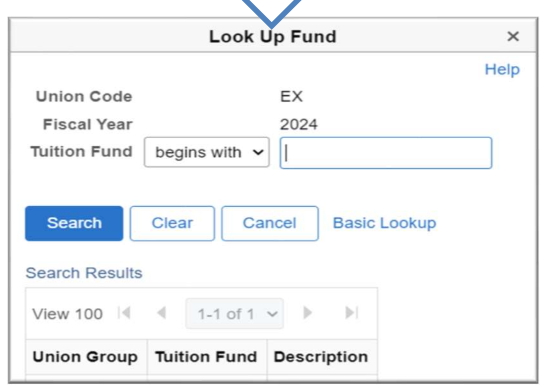
Course Provider	Effective Date	Description

- **Field 2: *Fund** – used to select the type of request

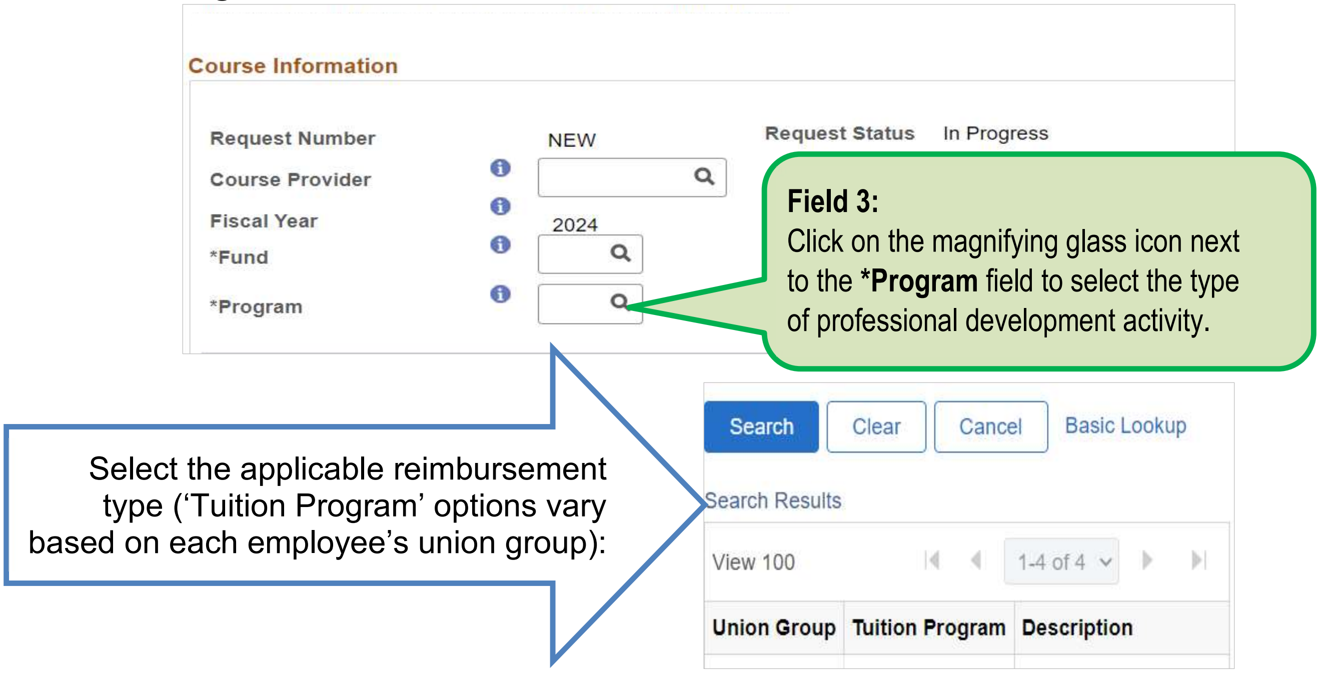


Field 2:
Click on the magnifying glass icon next to the "***Fund**" field and select T**uition Fund**

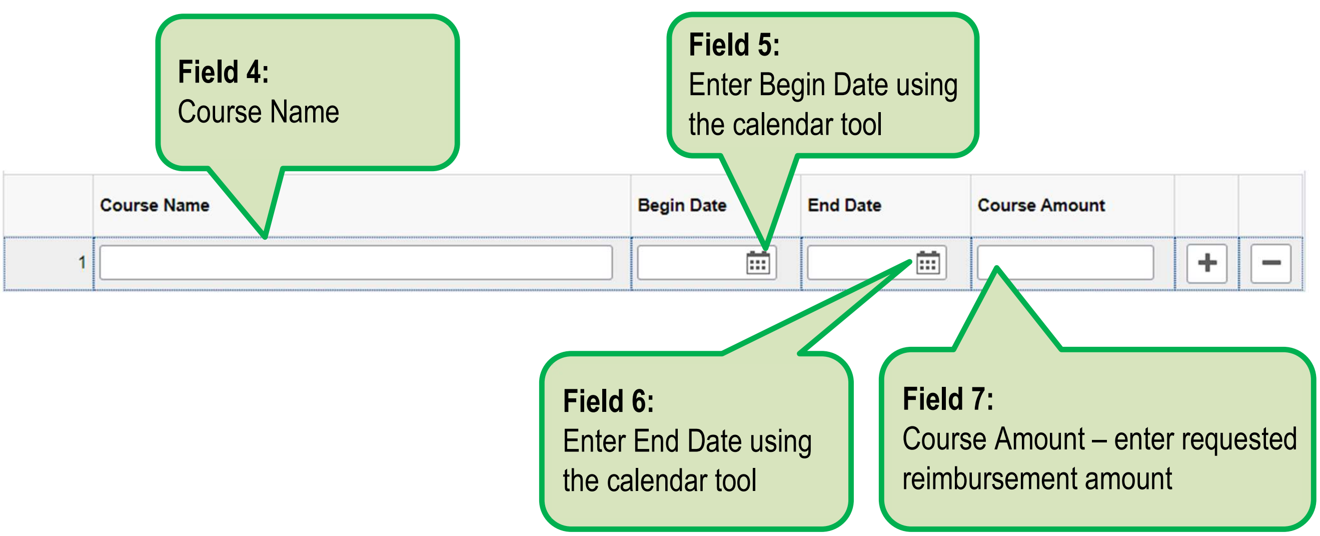
Select **Tuition Fund**.



- **Field 3: *Program**



- **Field 4: Course Name** – enter the applicable name in the field.
- **Field 5: Begin Date** – click the calendar icon to open the drop-down box and select the start date.
- **Field 6: End Date** – click the icon to open the drop-down box and select the date.
- **Field 7: Course Amount** – Enter the requested reimbursement amount in the field.

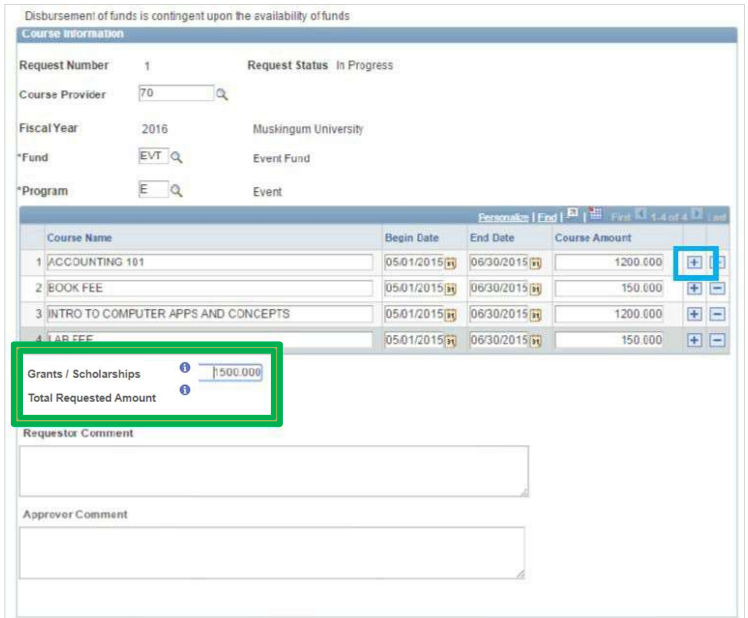


Employee Development Fund

Entering a Request for Reimbursement

Field 7: Course Amount, continued

Option: Click the **Plus Button** on the right side of each row to add additional rows to the request.



- **Field 8: Grants/Scholarships** – If it applies, enter the appropriate amount in the field.
- **Field 9**: **Requestor Comment** – space to add notes or additional information.

Note:
Approver Comment – no action needed; this field is for administrative use.

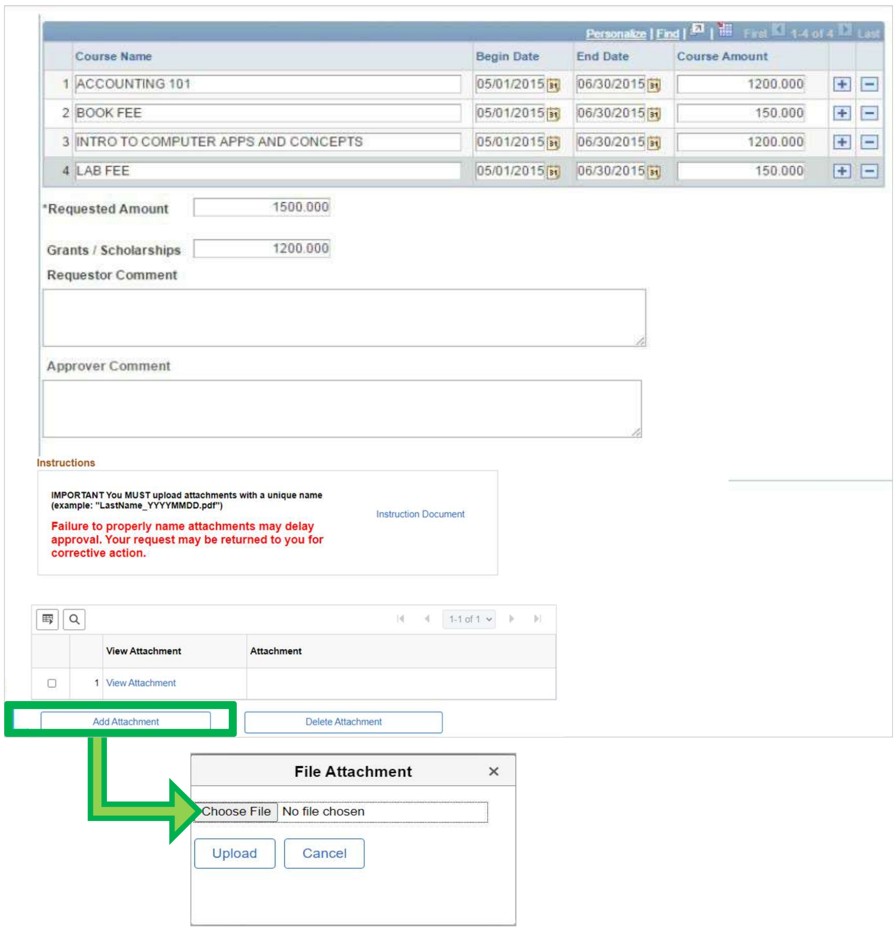
Employee Development Fund

Entering a Request for Reimbursement

Step 7: Add Attachments

Instructions (for Attachments) Section 3 – use this section to share the documentation that supports your reimbursement request:

- Attached required documents by clicking the “Add Attachment” button to open the “File Attachment” selection dialogue box.



Important: FYI = the EDF Reimbursement tool saves all attachments in the same location. For your documents to be correctly aligned to your request, you must upload them using a unique name. If your documents need to be renamed, you will need to complete this action prior to selecting them via the attachment process. Examples of how your file could be named include:

- LastName_YYYYMMDD.pdf
- SOUID_Certificate_of_Completion

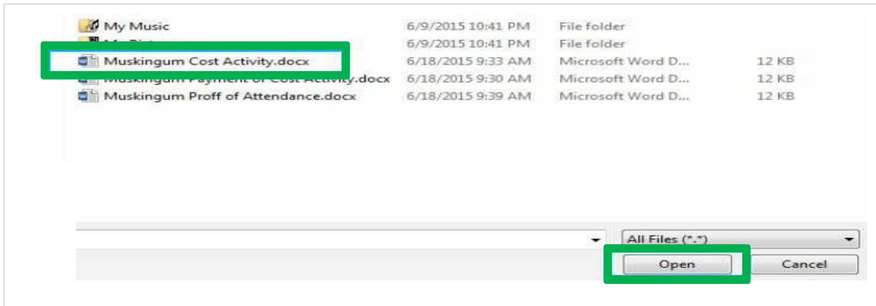
Failure to uniquely name your attachments can result in a delay of approval. Your request may be returned to you to make corrections/updates.

Employee Development Fund

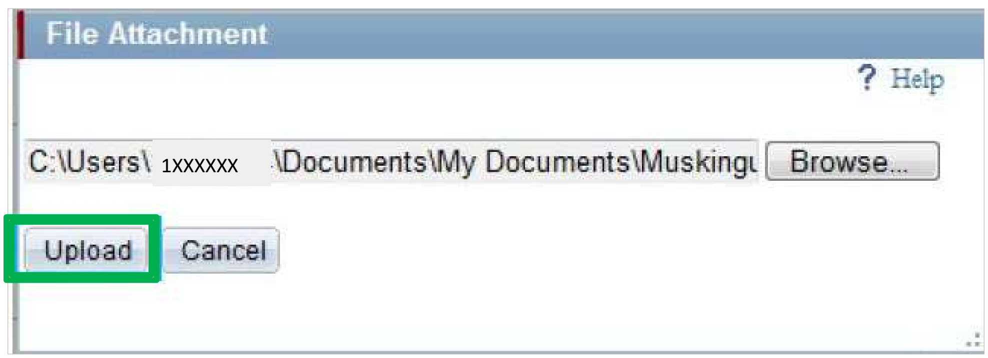
Entering a Request for Reimbursement

Step 7: Add Attachments, continued

- Select the document you want to attach. Click the “Open” button**.**



- Click “Upload.”



Note:

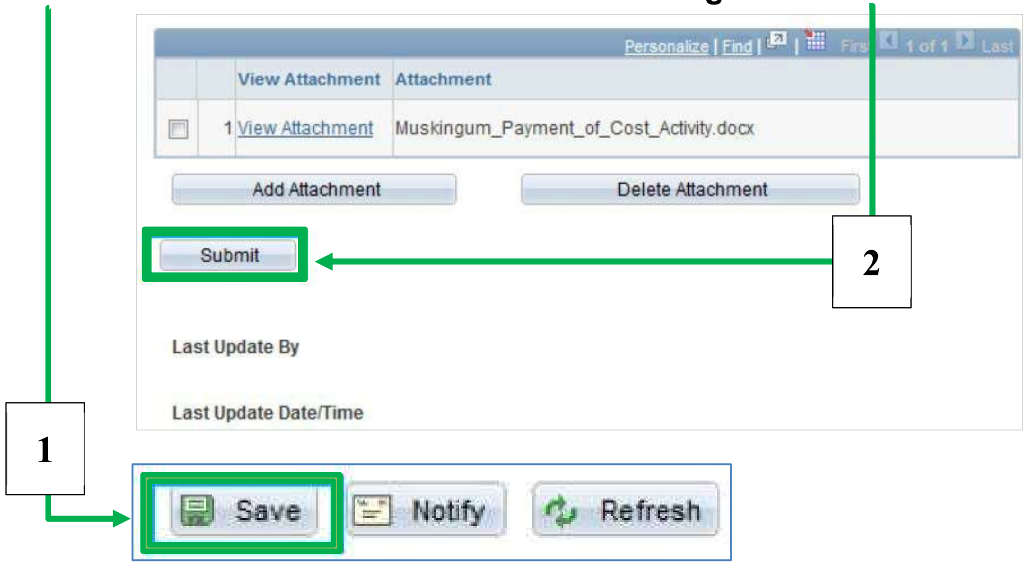
- For multiple attachments, repeat **Step7**.
- Attachments can be viewed prior to submission.
- Once the request is submitted the attachments you uploaded will no longer be available to view until the request has been approved or pushed back for further information.
- **Delete an Attachment** – check the box for the attachment you would like to delete and click **Delete Attachment**.

Employee Development Fund

Entering a Request for Reimbursement

Step 8: Save and Submit

You MUST click Save at the bottom of the screen before clicking the Submit button.



Note: Once submitted:

- The Add Attachment, Delete Attachment, and Submit buttons will inactivate.
- The "Last Update By" and "Last Update Date/Time" fields will be updated.