

Non-Degree Program Application Instructions

You may submit your application along with an itemized invoice and proof of payment to EdAssist up to 90 days prior to your course start date. All applications must be submitted no later than **30 days after** the course start date.

Step 1 - Pre-approval: Have a conversation with your manager about the non-degree program you wish to take. If your manager will not approve the course, it will not be eligible for reimbursement. Do not enroll in or pay for the non-degree program without first having pre-approval from your manager.

Step 2 - Enrollment: Enroll in and pay for your desired course. Be sure to collect a copy of an itemized invoice and proof of payment.

Step 3 - Application: Submit your application, invoice, and proof of payment (step-by-step instructions are below). Once approved by your supervisor, submitted documentation will be reviewed by the EdAssist team within 3 business days. If approved, your reimbursement will be processed on the next available payroll cycle. If further documentation is needed, the EdAssist team will reach out to you via email.

Step 4 - Completion Documents: You must submit proof of successful course or exam completion no more than **30 days after** the course end date. Acceptable documentation includes a certificate of completion, passed exam results, or proof of certification. Failure to submit this documentation will result in a cancellation of your application and repayment will be required.

Application instructions

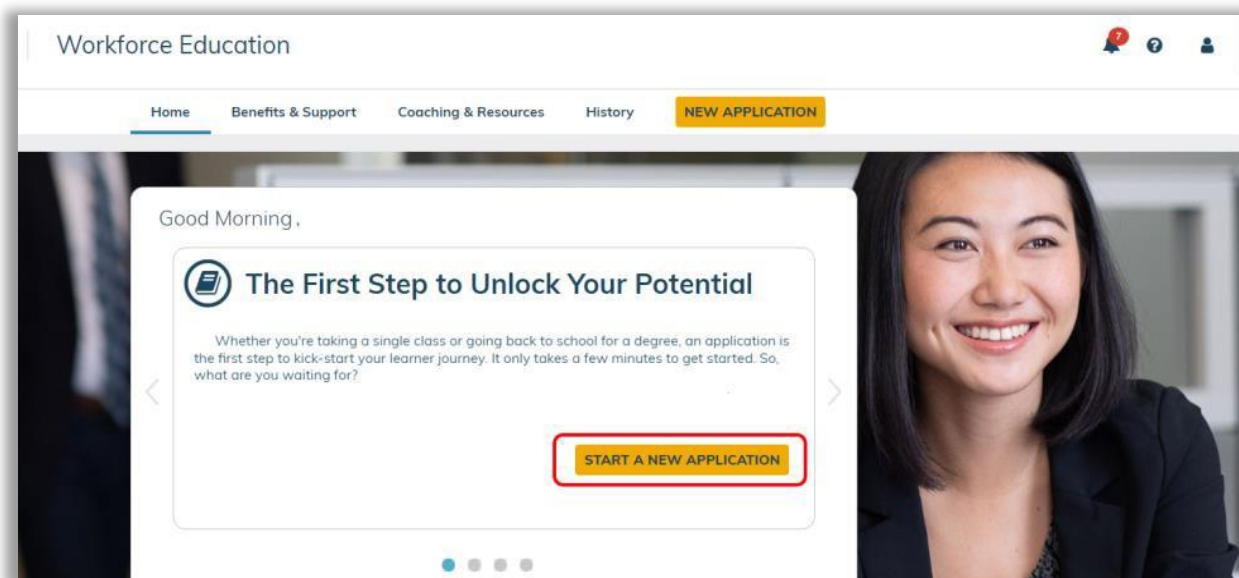
Please read all the instructions carefully as you complete your application. If you need assistance, please contact the EdAssist team via **Live Chat**, or by **phone** at 844-266-1532, available Monday – Friday, 8 AM – 8 PM ET.

Getting Started:

To get started, scan the QR Code or visit: <https://clients.brighthouse.com/vanderbilt>



1. Select **New Application** and click **Next Question** under your name on the following page.



- Under What type of learning is this application for?, scroll down to the Non-Degree section and select the most applicable option available: **Certification/Designation, Certificate, Continuing Education Units or Professional Development**, and then click **Next Question**.

The screenshot shows the 'Programs' step in the EdAssist application process. At the top, there are five numbered tabs: 1 Programs, 2 Learning Providers, 3 Expenses, 4 Agreements, and 5 Review and Submit. The 'Programs' tab is active. Below the tabs, the title 'Programs' is displayed. A red asterisk indicates a required field. The question 'What type of learning is this application for?' is shown with a document icon. Below the question, there is a dropdown menu labeled 'Education Program *' with 'Certification/Designation' selected. A yellow 'Next Question' button is located below the dropdown. At the bottom of the form, there are two buttons: 'Continue' (yellow) and 'Cancel' (white with a grey border).

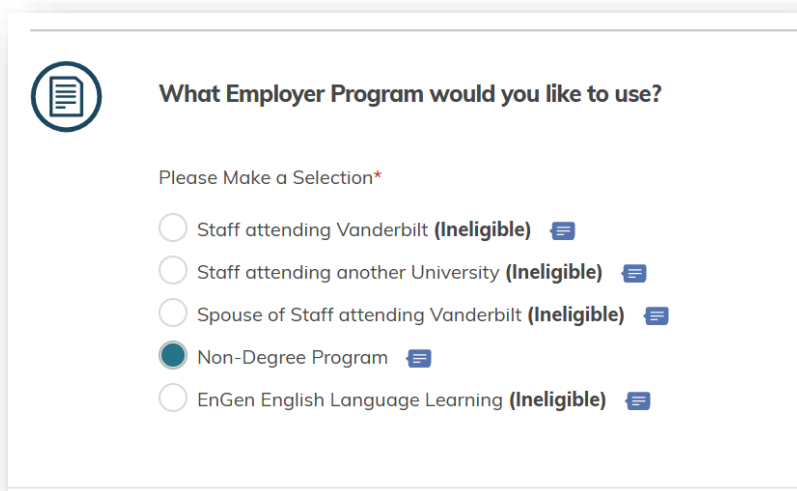
- Under Area of Study, type in or select the Non-Degree option you will be pursuing from the drop-down menu.

The screenshot shows the 'What is the area of study?' question. It features a document icon and the title 'What is the area of study?'. Below the title, it says 'Please Make a Selection *'. There is a text input field containing 'Business' with a clear 'X' button. Below this, there is another dropdown menu labeled 'What Category best fits this type of learning? *' with 'Select' chosen. A grey 'Next Question' button is at the bottom.

- Under What category best fits this type of learning?, select the most appropriate category, and click **Next Question**.

This screenshot is similar to the previous one, showing the 'What is the area of study?' question. The text input field still contains 'Business'. However, the dropdown menu 'What Category best fits this type of learning? *' now has 'Course' selected. The yellow 'Next Question' button is visible at the bottom.

5. For the Employer Program, select **Non-Degree Program**. If you have any additional questions around the Non-Degree program you can click the bubble next to Non-degree, which will provide you with the program policy. Select **Next Question** to continue.



What Employer Program would you like to use?

Please Make a Selection*

☐ Staff attending Vanderbilt (Ineligible)

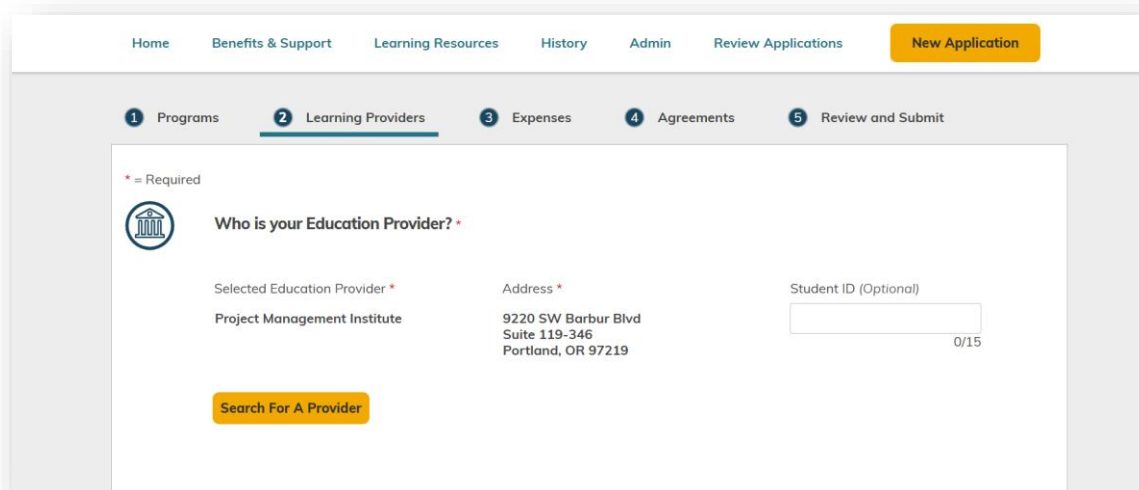
☐ Staff attending another University (Ineligible)

☐ Spouse of Staff attending Vanderbilt (Ineligible)

☒ Non-Degree Program

☐ EnGen English Language Learning (Ineligible)

6. Click **Search for a Provider** and type the name of the education provider associated with your course or certificate, then hit enter or click **Search**. Choose the correct provider from the list, then click **Continue**.



Home Benefits & Support Learning Resources History Admin Review Applications New Application

1 Programs 2 Learning Providers 3 Expenses 4 Agreements 5 Review and Submit

* = Required

Who is your Education Provider? *

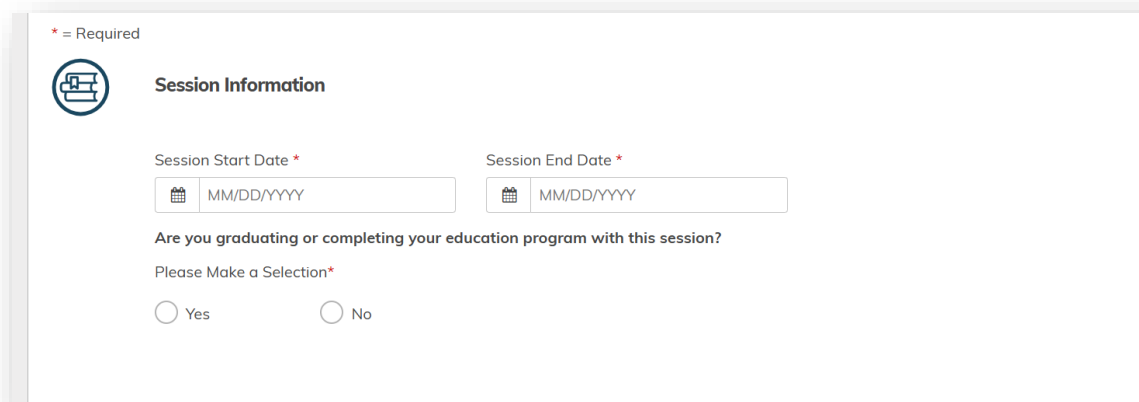
Selected Education Provider *
Project Management Institute

Address *
9220 SW Barbur Blvd
Suite 119-346
Portland, OR 97219

Student ID (Optional)
0/15

Search For A Provider

7. Enter your Non-Degree session start date, end date, indicate if you will complete the course with this session, an expected completion date, then select **Add Course Expenses**.



* = Required

Session Information

Session Start Date *
MM/DD/YYYY

Session End Date *
MM/DD/YYYY

Are you graduating or completing your education program with this session?
Please Make a Selection*

☐ Yes ☐ No

8. Under Course Information, select **Add a Course & Related Expenses**, and enter the requested information, including the total cost of your course. If you have any additional expenses to enter in addition to the course cost, add it under **Add an Expense**. If not, proceed to answer the tax questions and then select **Add Course**. Then, click **Continue** at the bottom of the page.

* = Required

Add a Course & Related Expense

Course Name * 0/40

Course Number * 0/12

Amount *

Credit Hours (Optional)

Instruction Type *

9. Next, indicate if you have received any discounts, scholarships, or grants for this education. Then carefully read and agree to the **Participant Agreement**, and the **FERPA Agreement**. Then enter your name and select **Continue** to review all details of your application before you submit.

New Application

1 Programs 2 Learning Providers 3 Expenses 4 Agreements 5 Review and Submit

Agreements

* = Required

Did you receive any grants, scholarships, or discounts?

Please Make a Selection*

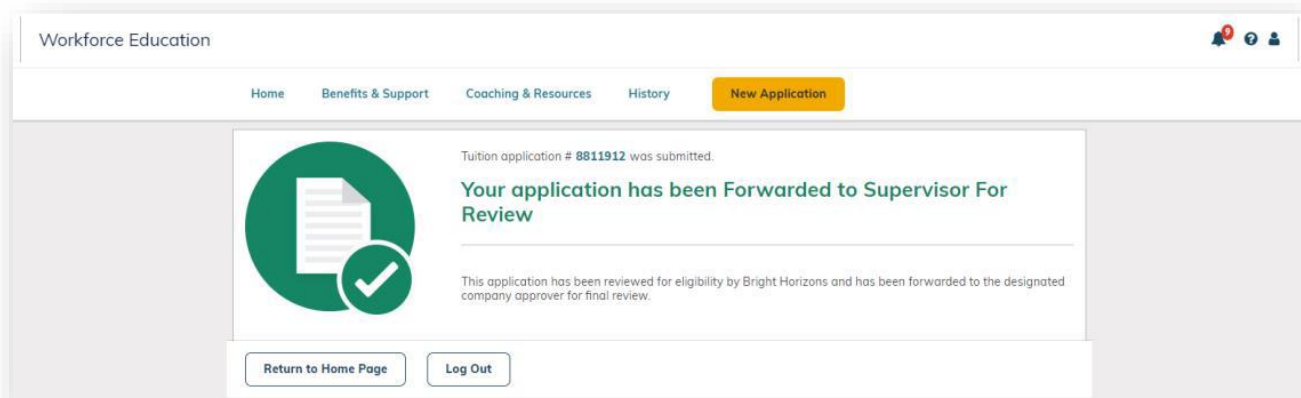
☐ Yes ☒ No

Agreements

Participant Agreement

I have read and understand the terms and conditions set forth in the CVS Health Colleague Education Program 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

10. If all details on the summary page are correct, select **Submit Application** and it will be routed to your supervisor for approval. If there are any issues with your application like missing information or invalid entries, the application will be denied or marked incomplete, and further instructions will be provided to you.



11. Once submitted, you can go back into your application by clicking on the application number on the home page. Once in the application, you can upload documentation of the course, an itemized invoice, and proof of payment.

* = Required

Supporting Documentation

What document types are supported?

Upload documentation to receive your benefit. Documentation should include the following information, when applicable:

- Your Full Name
- Education Provider Name, Logo, and/or URL
- Course Name & Number
- Session Dates or Term
- Grade/Proof of Completion
- Credits/CEUs/PDUs Earned
- Itemized Cost of Education

You are responsible for submitting complete and accurate documentation as part of your application which will be verified by EdAssist. The submission of false or modified documentation for any reason violates your employer's tuition policy and will be reported to your employer.

Documents (Optional)

All required documentation must be submitted by [REDACTED].

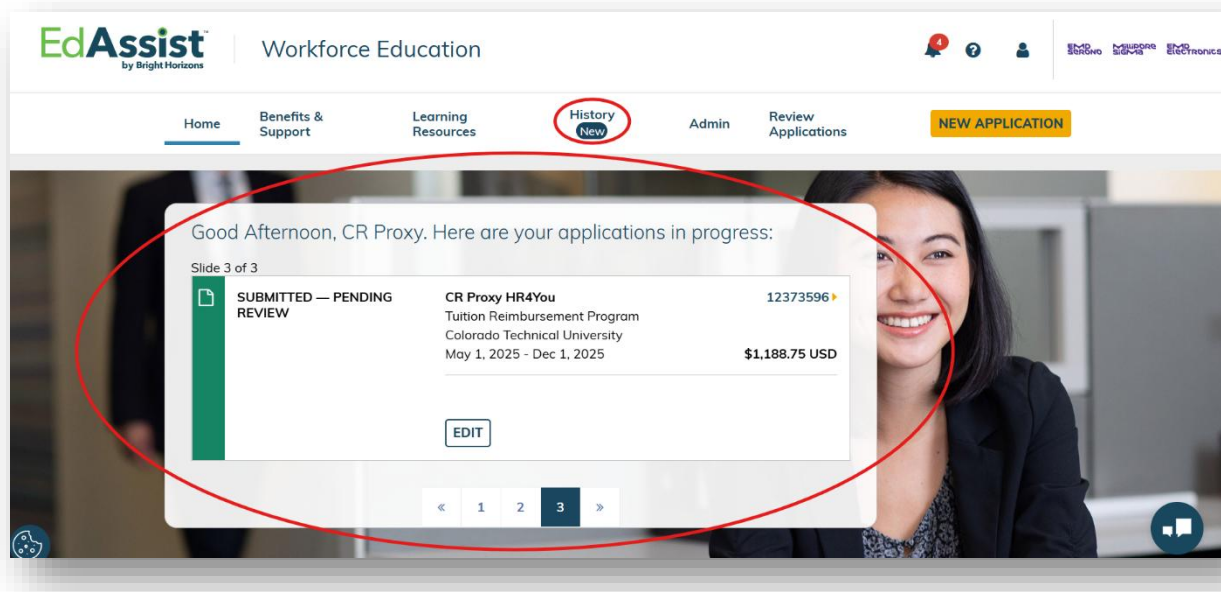
Click to upload or drag and drop
PDF, PNG, or JPEG Preferred, 15 MB Maximum

12. If your supervisor approves the application, you will receive an email that your application from EdAssist. If you haven't done so already, you now need to submit your course documentation and invoice/proof of payment. Documentation will be reviewed by the EdAssist team within three business days. If additional information is needed, you will be notified by EdAssist. Once approved by EdAssist, reimbursement will be made on the next available payroll cycle.

*Please note that payments can be made prior to course completion. You **do not** need to wait to complete the course before you can be reimbursed.*

13. You **must** submit documentation to show the successful completion of your course **no later than 30 days** from the end of the course. To do this, select the application number that was previously paid out and approved within the History tab or carousel on your home page and upload your successful completion documentation.

If you fail to complete this step, your application will be denied, and you will be required to repay the reimbursement that had previously been provided to you.



14. Your documentation will be reviewed by EdAssist within three business days. If approved, you will receive an email that your application has been approved and closed out. If there is an issue or EdAssist requires additional documentation, you will be notified via email by EdAssist and provided with details on your next steps.