Cook County iExpense User Guide: Tuition Reimbursement

Cook County Bureau of Human Resources
Official User Guide

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Introduction

Cook County ("County") values County employees and is invested in their professional and personal development. The County encourages a culture of continuous learning and is committed to providing employees opportunities to enhance their skillsets and increase the scientific, technical, professional, and management abilities of our employees to meet both the present and future employment needs of the County. To support employee development and to attract and retain employees with superior ability and potential for advancement, the County has established the Tuition Reimbursement Program ("Program").

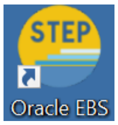
Employees who have successfully completed at least 12 months of service with the County are eligible to participate in the Program unless other terms are provided according to an applicable Collective Bargaining Agreement.

Before requesting reimbursement through iExpense, employees must ensure that they obtain all necessary pre-approvals from the Cook County Bureau of Human Resources ("BHR") in advance of beginning the planned course(s). Only after the successful completion of the approved course(s), can employees request reimbursement through iExpense. Refer to the Cook County Tuition Reimbursement Program Policy for additional guidance and details.

Accessing iExpense

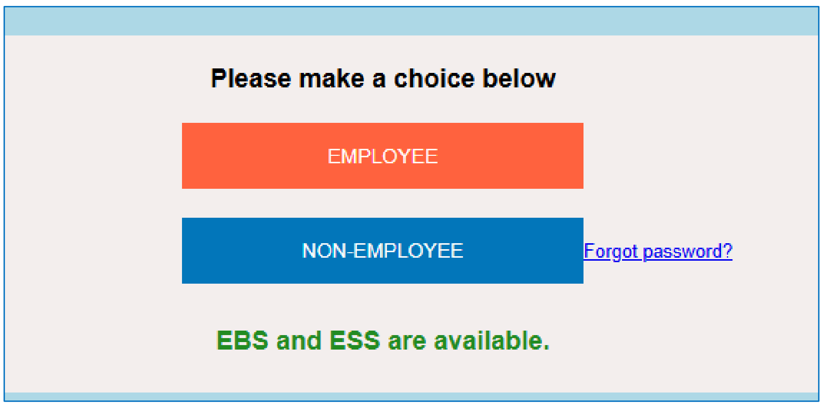
In this section, you will learn basic functions of iExpense including how to access the module, read the home screen, generate an Expense Report, delegate Expense Report creation to another County employee(s) and check a payment status.

To access the iExpense module, use the iExpense User responsibility in Oracle EBS. Access options vary depending on your location:

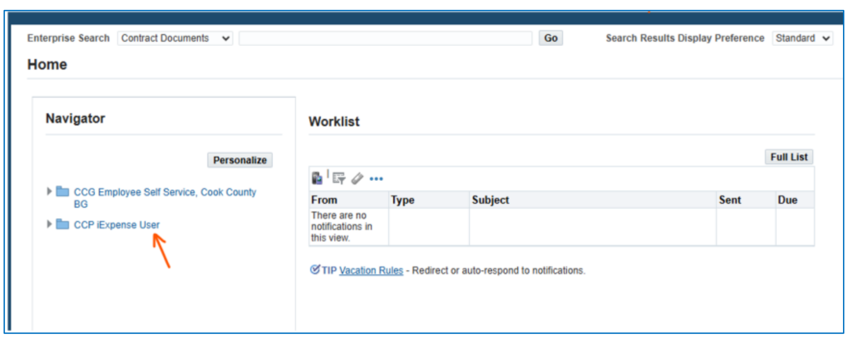


- Inside the Office or via VPN: https://ccgprod.ccounty.com
- Outside the County Network: https://ccgprod.cookcountyil.gov

1. Log in to Oracle EBS using your Single Sign On.

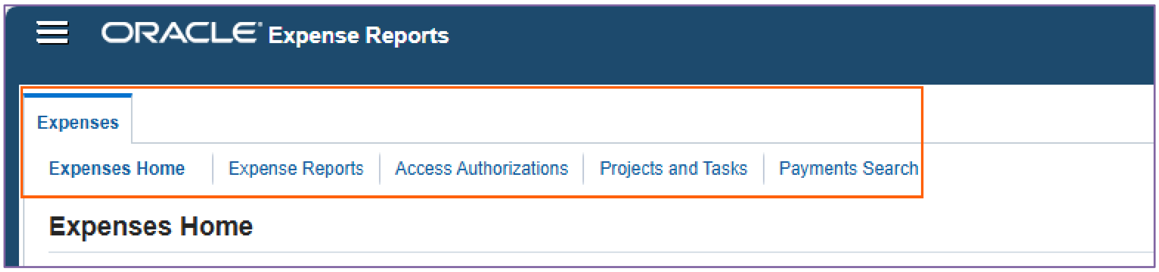


2. Select CCP iExpense User from your list of available responsibilities.

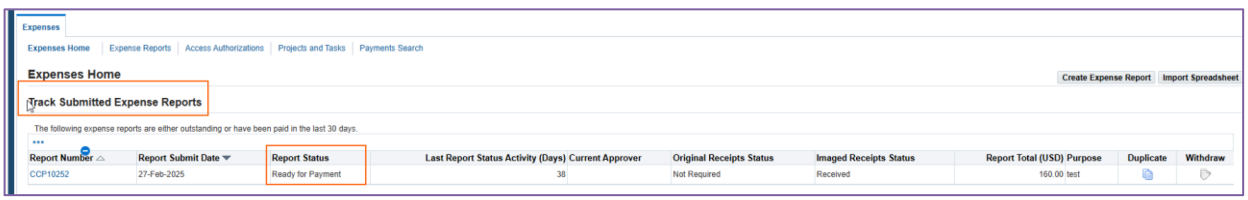


Navigating iExpense

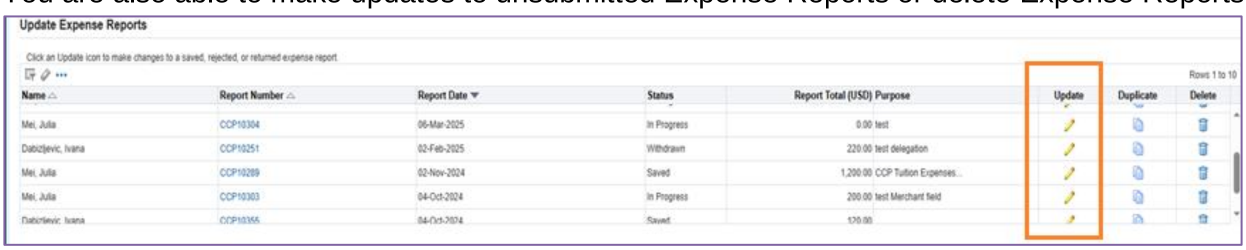
Once logged in under **CCP iExpense User,** you will land on **Expenses Home** page, which consists of five tabs:



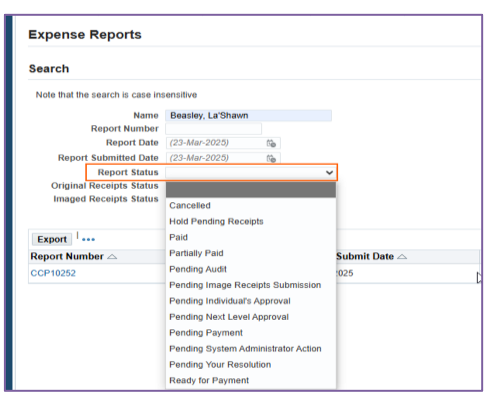
1. **Expenses Home**: View, update, or delete unsubmitted Expense Reports.
   - Under Expenses Home screen, you can see the Expense Reports you submitted and its status.



   - You are also able to make updates to unsubmitted Expense Reports or delete Expense Reports.



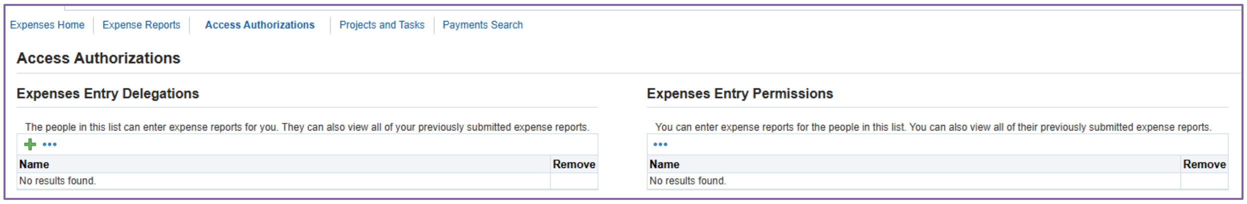
2. **Expense Reports:** Search your reports by number or status.
   - Within this tab, you can run reports using different parameters such as '*Report Number*' (i.e., Expense Report Number), '*Report Status*'.



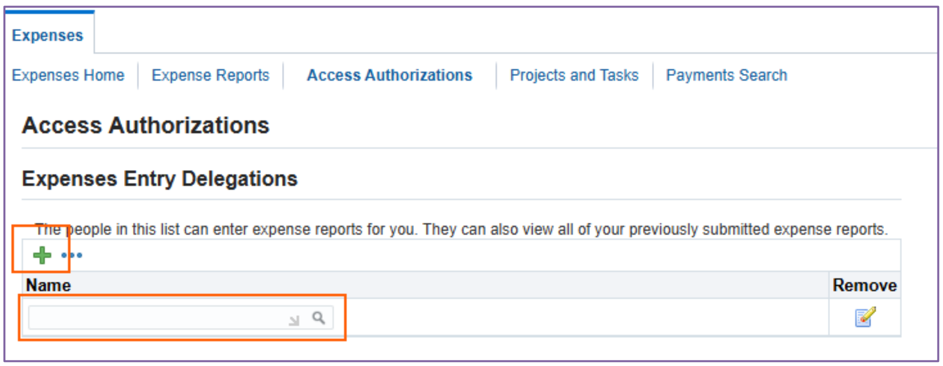
NOTE

Employees are only able to search their own Expense Reports on this screen.

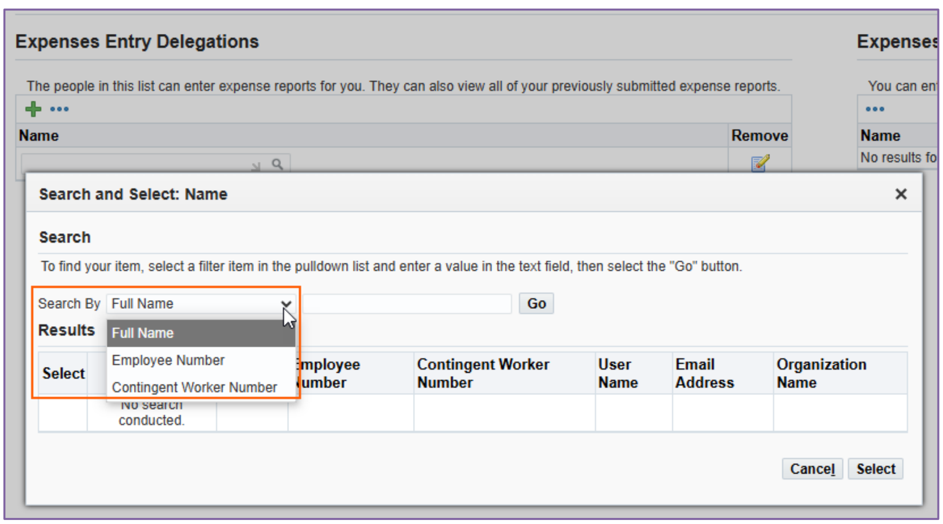
3. **Access Authorizations**: Delegate report creation to another employee.



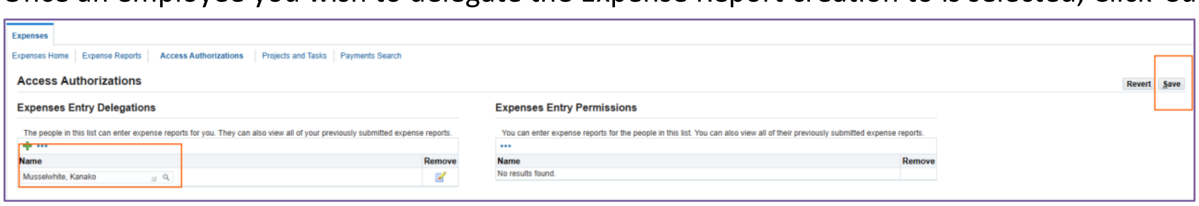
- Click on plus sign '+' to add the name of the employee whom you delegate Expense Report creation on your behalf.



- Click Search icon to search '*Full Name*' or '*Employee Number*'.



- Once an employee you wish to delegate the Expense Report creation to is selected, Click '*Save*'.

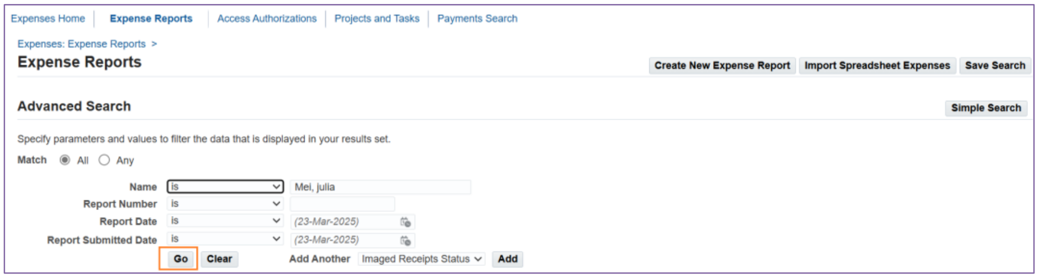


- If someone designated you to enter Expense Reports on their behalf, you would see their name(s) in '*Expenses Entry Permissions'* sections on the screen.

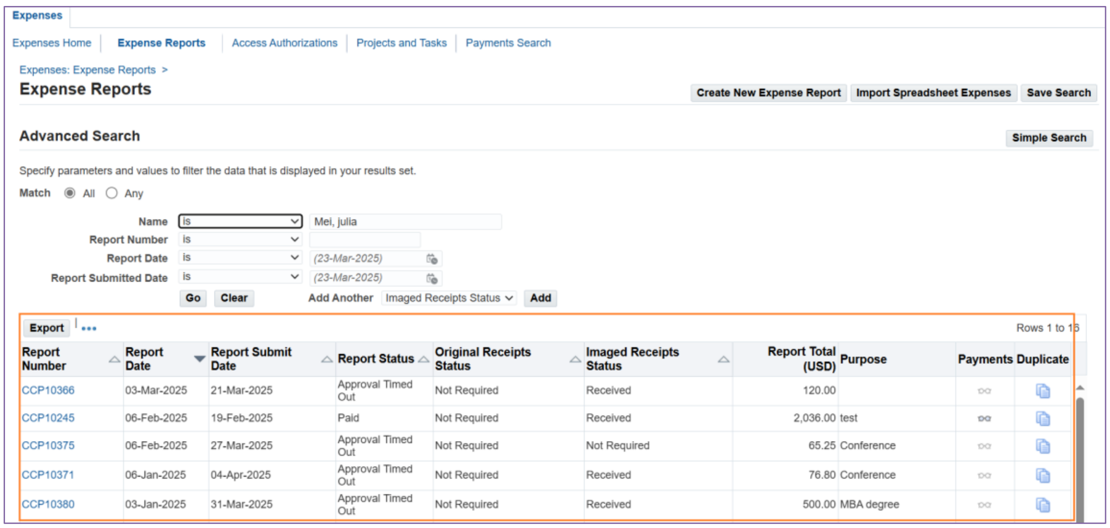
NOTE: While a designated employee can enter the Expense Report on your behalf, once those reports are created, they will be routed to you for your review and approval before they can be routed to your designated Department approver.

4. **Payment Search**: Track your Expense Reports using filters.

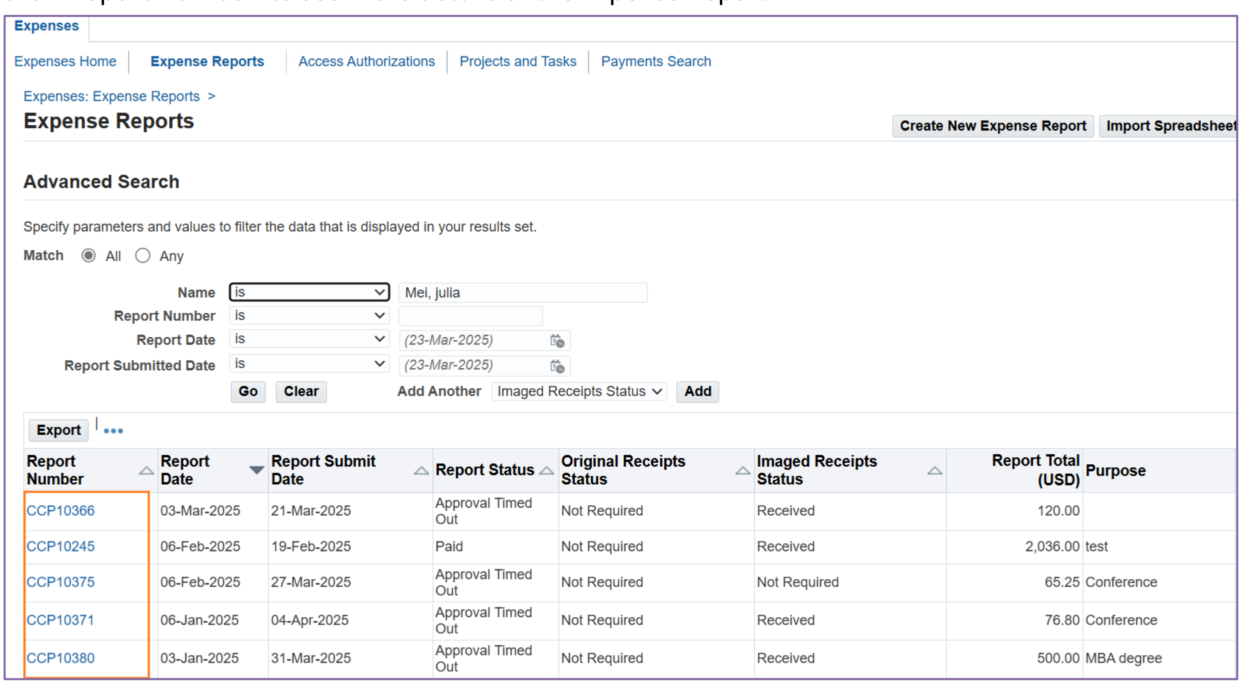
- Enter the desired criteria and click on '*Go*' to perform the search.



- Results will display at the bottom of the page.

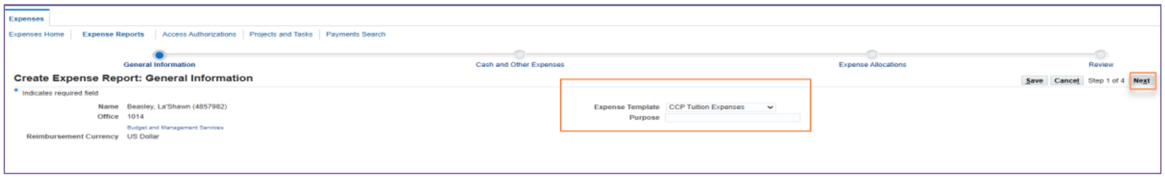


- Click 'Report Number' to see more details of the Expense Report.

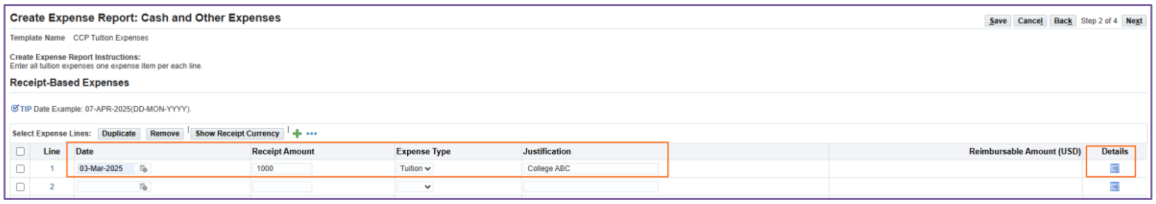


Creating a Tuition Expense Report

Step 1: Select Expense Template *'CCP Tuition Expenses'* as the Expense Template from the dropdown menu, then click '*Next'*.

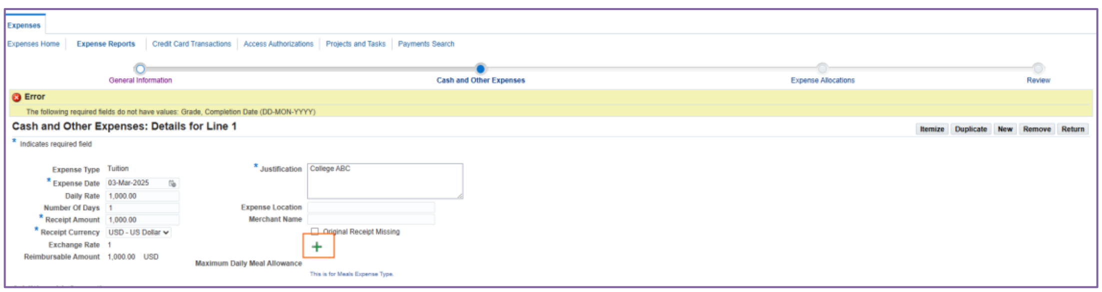


Step 2: Add Expense details by clicking 'Details'.

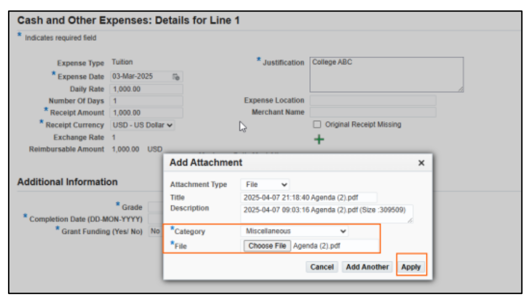


- Add each course expense for each reimbursement you are seeking with date, amount, justification, and grade details.

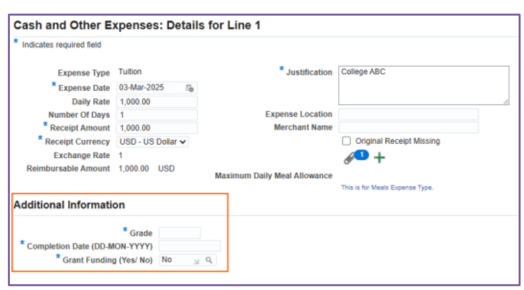
Step 3: Upload required documents (receipt, grade report, etc.) in accordance with the Tuition Reimbursement Program Policy by selecting the '**+**' on the '*Details'* page.



- Click on '*Choose File'* to select a file you want to upload then click '*Apply*'.

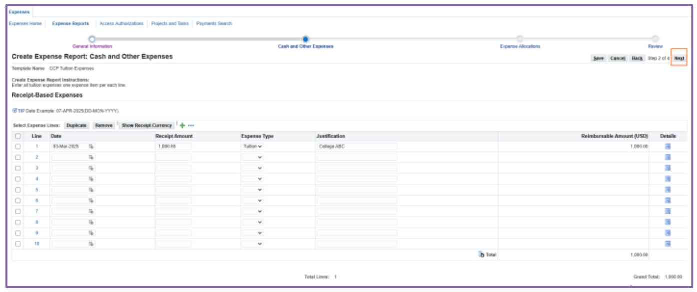


- Fill out '*Additional Information'* and click '*Return*'. Note '*Grant Funding'* should default to *No*.

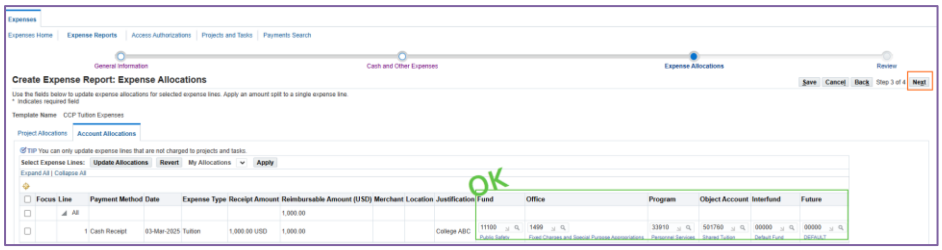


NOTE: County does not reimburse you for tuition unless your grade is C or better (or pass).

- Click ‘Next.’

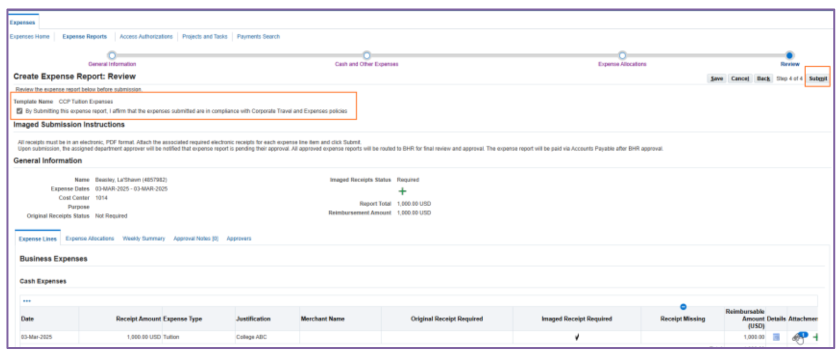


Step 4: GL Allocation is defaulted to the Bureau of Human Resources designated account. Users are not to edit the GL. Select ‘*Next*.’



Step 5: Review, confirm compliance, and submit.

- Once you have reviewed select the check box, then click ‘*Submit*.’



What Happens Next

The system will display confirmation of Expense Report submittal. Your submission is now routed to BHR for final review and approval. The expenses will be paid only after BHR completes its approval steps.