ABSTRACT
This user guide provides an in-depth look at the process of initiating Tuition Exemption Request forms by LSU employees to obtain tuition exemption for various LSU courses.

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INITIATING A TUITION EXEMPTION REQUEST

LSU BPM User Guide
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What is the Tuition Exemption Request procedure?

It is a Business Process Management procedure developed by Financial Systems Services to streamline tuition exemption requests by utilizing an automated, electronic process. This web-based process will be accessed by various employees of the LSU community seeking tuition exemption and will include automatic routing through the appropriate approval processes as prescribed by University policies. Tuition Exemption can be initiated by accessing the Tuition Exemption Request link under the Employee Resources heading on the left-hand side of the MyLSU desktop.

Getting Started

Once the Tuition Exemption Request link is clicked, the form will open in a new window displaying a list of criteria that must be met in order to qualify for tuition exemption. The criteria for eligibility must be read, understood, and agreed to by the Requestor prior to being allowed to continue with the process. The “I agree” button at the bottom of the page must be clicked to continue.
Request Tab

The first stage of the process consists of gathering information specific to the requesting employee and semester for which the request is being made on the Request tab. This includes filling out the sections pertaining to the employee’s employment and contact information, Supervisor and Department Head, and the Semester/Work Information.

1. **Employee Information** - In the first section, the employee’s LSU ID, Department, Name, Title, and Phone number are all populated automatically. The phone number is editable, so the employee may change this field to reflect their accurate work phone number.

2. **Supervisor/Department Head Information** - In the second section, the employee must choose their Supervisor and Department Head from their respective dropdown boxes. If either the Supervisor or Department Head options are either missing or incorrect, the check box should be checked and the correct Supervisor and/or Department Head information should be populated in the box outlined in red that appears. This information will be routed to the employee department’s HR contact in order to correct. Once corrected, the request will be placed back into workflow to continue the approval process.

![Figure 3: Tuition Exemption Request Information Page](image)

![Figure 4: Employee Information](image)

![Figure 5: Supervisor/Department Head Information](image)
3. **Semester/Work Information** - In the last section of the Request tab, the employee must fill out their semester and specific work information pertaining to the request. This information helps the system obtain the actual classes in which the employee is enrolled, determines eligibility, and determines whether or not additional information must be provided such as a modified work schedule for when more than the normal allotted work hours will be needed to attend courses. All of the fields in this section are required and will be validated prior to the form being submitted for approval.

![Figure 6: Semester/Work Information Section](image)

If the employee is requesting reimbursement for Independent or Distance Learning Courses, then the “Yes” radio button next to the “Is this request for Independent and Distance Learning Courses?” question must be clicked. There will be a message displayed letting the user know that LSU Online is not included in this selection nor is it eligible for tuition exemption.

![Figure 7: Selecting Independent and Distance Learning Courses](image)

If the employee must miss more than the allowable number of work hours to attend class a modified work schedule is required. The Requestor should click the “Yes” radio button and enter a modified work schedule in the “Enter Modified Work Schedule” section that automatically appears. Once it is entered, click “Add Modified Work Schedule” next to the green plus to save the schedule to the request.

![Figure 8: Entering a Modified Work Schedule](image)
Form Validation

If the request is missing any required information when the “Continue” button at the bottom of the page is clicked, a pop-up box will be displayed with instructions listing what fields are missing that must be entered before the user can continue. Click “OK” and make any corrections before clicking “Continue” again. If there are no missing required fields once the “Continue” button is clicked, the form will populate the Registered Course(s) section or the Add Independent and Distance Learning Courses section depending on whether or not the “Is this request for Independent and Distance Learning Courses?” radio button is selected as Yes or No. These two sections are described in more detail below.

Registered Course List

If the request is not for Independent and Distance Learning Courses, which would mean the “Is this request for Independent and Distance Learning Courses?” radio button is selected as No, the Requestor will be shown the Semester/Work Information they entered and the registered course(s) for the selected semester will be populated in the Registered Course(s) section. If the Requestor has entered incorrect information at any point in the request “Edit Semester/Work Information” can be clicked. This will allow the Requestor to edit the request information before continuing. A pop-up box will appear that warns the user that editing the semester or work information will clear all course information that has been entered up to this point. (Note: Requestor will have to re-enter course information once cleared.)
If no courses are found for the selected semester information, a pop-up box will be shown to inform the Requestor. The Requestor should click “OK” and either correct the semester information, register for courses for the selected semester before requesting tuition exemption, or click “Cancel” to terminate the process and close the request.

**Independent and Distance Learning Course(s)**

If the request is for Independent or Distance Learning Course(s), which would mean the “Is this request for Independent and Distance Learning Courses?” question is selected as Yes, the user must manually enter the course(s) they are taking and for which they are requesting tuition exemption.

All three fields are required, so a pop-up box will be displayed if any fields are left blank once the “Add Class” button is clicked. Once a course has been entered and the “Add Class” button has been clicked, the entered course will be added to and shown in the Registered Course(s) section.

(Note: If a course was entered incorrectly, the Requestor should click “Edit Semester/Work Information” and re-enter the course information.)

**Submitting the Request**

Once the Requestor has verified that all information entered is correct, click “Submit”. A pop-up box will be displayed with an acknowledgement that must be agreed to before continuing. Click “OK” to submit the request or “Cancel” to return to the request.
Once “OK” is clicked to confirm acknowledgement, a pop-up box will be displayed notifying the Requestor that the request was submitted and the browser can be closed by clicking “OK”.

**Cancelling the Request**

If the Requestor decides to cancel the request, a confirmation box will be displayed that requires the Requestor to confirm the cancellation. Clicking OK will cancel the request.

**Comments Tab**

This page is designed to help Requestors, users, and Approvers review any notes that have been added to the request throughout the entire process. Start by typing the comment in the Add Comment box and save the comment by clicking “Save Comment”. You will see your comment saved to the Process Comments section. Each comment entry is logged with a commenter name, the commenter’s role, and the date and time of when the entry was created.
Email Confirmation of Submitted Request

Once the request is submitted for approval, the Requestor will receive an email notification containing the pertinent request details confirming the successful tuition exemption request submission.

Figure 18: Email Confirmation of Request Submission

Rework Request

At any point in the request process the approving authority can send the request back to the Requestor for a “rework”. The Requestor will receive an email with a link to the rework form which will allow the Requestor to review or edit any request information. The approver that initiated the rework process was required to log an explanation on the comments tab, therefore there will be a message in red at the top of the page prompting the Requestor to review those comments. The Requestor can also log comments of their own by clicking the Add Comment button at the bottom of the form or by clicking on the Comments tab at the top of the form.

The Requestor can either correct the errors and submit the changes or withdraw the request.

Figure 19: Rework Form View
Explanation of Required Approvals

There are three stages through which the request will have to pass in order to obtain exemption for the requested course(s):

1. **Supervisor/Signature Authority stage** – The Requestor’s supervisor or the signature authority that was chosen by the Requestor on the request (all possible choices would be given in the dropdown box).

2. **Department Head/Dean stage** – A unit’s Signature Authority, Department Head, and/or Dean will be included in the Department Head dropdown box on the initial page and whichever is chosen as the approver in that box will be used to satisfy this stage’s approval requirement.

3. **Benefits stage** – The HR Benefits authority from the Requestor’s campus.

Once all three stages’ approvals are satisfied, the exemption for the requested course(s) is loaded into the LSU system and the user is notified.

![Required Approval Stages](image1)

**Figure 21: Required Approval Stages**

**Subsequent Request Tracking**

The Requestors and Approvers of tuition exemption requests that have been submitted can track the progress of any requests by visiting their LSU BPM Portal by clicking on “LSU BPM” after logging in to myLSU as seen in Figure 22.

As seen in Figure 23 below, you will notice two main sections once in the LSU BPM Portal: “To Do List” and “Watch List”. The To Do List contains all requests for which the person visiting the portal needs to action with either an approval or disapproval decision. The section contains the Process Name of the request, the Stage name for the stage in which the request is sitting, and the Start Date the request was initiated. There is also a link in underlined blue font named “Process Request” which, once clicked, allows users to view the request in order to approve or disapprove it.

The second main section is entitled “Watch List” and contains all requests for which the person visiting the portal has either originally initiated or previously approved. These requests can be clicked on in order to view their progress if still in process or to view the final details if the request is completed or cancelled. Requests will remain on the Watch List for 60 days after the request is completed or cancelled and will then subsequently be archived and removed from the list.

![LSU BPM Link in myLSU](image2)

**Figure 22: LSU BPM Link in myLSU**
Process Overview Form

If the Requestor wants to review progress of a request, they can click on the particular request in their Watch List to review the Process Overview Form for that request. The overview form shows all the Requestor information, any approvals obtained to date, the specific courses requested, any comments added to the request, various general request information, and the individual(s) the form is waiting on for approval.

See the LSU BPM Introduction link on the FSS website to learn more about the LSU BPM Portal.