Physician/Faculty Dependent Children Portable Tuition Assistance Benefit Frequently Asked Questions

What has changed?

NorthShore University Health System launched a new online Tuition Reimbursement system in December 2010. Tuition reimbursement claims are no longer processed by our internal human resources staff. We have hired Edcor, an independent third-party administrator who specializes in providing this service.

Edcor Self-Service Options	
Apply for tuition reimbursement	Visit https://northshore.tap.edcor.com
Submit your reimbursement request online	Visit https://northshore.tap.edcor.com
Track the status of your application or reimbursement request	Visit www.trackmystatus.com
Review past tuition reimbursement	Visit https://northshore.tap.edcor.com
Edcor Customer Service	
Customer Service Line for Employees	Call 1-800-326-0560 to speak with an Edcor representative. Available Monday – Friday from 7:00 a.m. to 7:00 p.m. CST.

How do I log into the new system?

1. From home: Visit https://northshore.tap.edcor.com or http://www.northshore.org/employees/ to access the application system.
   From work: Visit Pulse > Employee Services to access the application system.
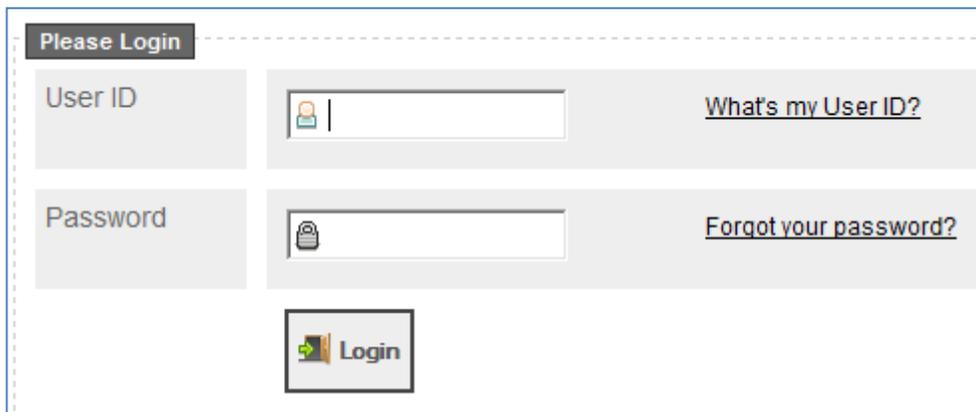
Enter your User ID (*6-digit employee ID*) and Password. Your employee ID number is available in the upper left-hand section of your pay advice.

> **First time users: Your password is your 5-digit home zip code. You will be asked to change your password after logging in for the first time.**
>
> **Forgot your password? Click the Forgot your password? link, enter your user ID, and follow the instructions to request a new password.**

2. If you do not have an email address on file, you will be asked to enter one.
3. Read and agree to the site's *Terms and Conditions*.

How do I add a dependent?

Each employee, physician, and dependent has a unique ID in the Edcor system. To claim tuition reimbursement for spouses, domestic partners, or children, **physicians must create a dependent account for each dependent**.

1. From your tuition reimbursement program home page, select "Dependent Enrollment Tools" from the left menu.

2. The dependent enrollment screen displays enrolled dependents. Click the "Enroll New Dependent" button enroll a new dependent.

3. Review the instructions and then click "Proceed."
4. Complete the enrollment form and then click "Proceed."

Enrollment Form

* = required fields

Student Relationship To Employee: * CHILD

Student First Name: * TEST   Last Name: * CHILD

Street Address Line 1: * 1234 MAIN STREET

Street Address Line 2: APARTMENT 101

City: * ANYTOWN   State: * MAINE   ZIP Code: * 12345

Please ensure this is a valid address for the STUDENT

Proceed   Cancel   Reset Form

Note: You may use either the student's home address or school address. Please make a note of the 5-digit zip code of the address you use. The zip code is required to log into the dependent's account.

5. Review the agreement and then click "I Agree." A confirmation screen will appear.
6. Return to the "Dependent Enrollment Tools" page to review enrolled dependents. **Make a note of the Dependent ID number for each dependent**.

Currently Enrolled Dependants

Dependant Name   Dependant ID
MARY TEST   DEP0000005
JOHNNY TEST   DEP0000006

Enroll New Dependant   Cancel

7. The new Dependent ID will be available for use after 24 hours; you do not need to wait for email notification. The user name will be the Dependent ID, and the first-time password will be the 5-digit zip code used during dependent enrollment. You will be prompted to change the password the first time you log in.

What is the deadline for submission of my reimbursement request?

Requests must be received no later than 60 days after the end of the term. Failure to submit your request within this timeframe will result in the rejection of your request.

How do I submit an application?

You must create an application and then submit a reimbursement request. Both steps can be completed at the same time.

1. Log in using the appropriate Dependent ID and password.

> **First time login with Dependent ID: The password is the 5-digit zip code used during dependent enrollment. You will be asked to change the password after logging in for the first time.**
>
> **Forgot the password? Click the Forgot your password? link, enter the Dependent ID, and follow the instructions to request a new password.**

2. You will need the following information to submit an application:
   a. Degree type (associate's, bachelor's, master's, or doctorate)
   b. Major field of study (e.g., nursing, business)
   c. School name

   > **Physicians seeking reimbursement for their own education may only select the University of Chicago. Physicians with fewer than five years of service may contact Susan Abraham at (847) 570-5336 for assistance in using the employee tuition reimbursement program.**

   d. Term start and end dates

   > **Use the school's official dates. Reimbursement may be delayed or denied if term dates on grade report and receipt do not match the application.**

   e. Course number
   f. Course name
   g. Course credit hours
   h. Course tuition amount
   i. Course-related fee amount (e.g., laboratory fee)
   j. Required fees amount (e.g., registration fee)

   > **Required fees are those required for all students enrolled at the school.**

k. Grant and/or scholarship amounts

> **You must report any financial aid that does not need to be repaid. Your reimbursement from NorthShore may be reduced by this amount.**

3. Select "Submit a New Application" from the "Submit Application" menu on the left side of the Home page to begin the application process.
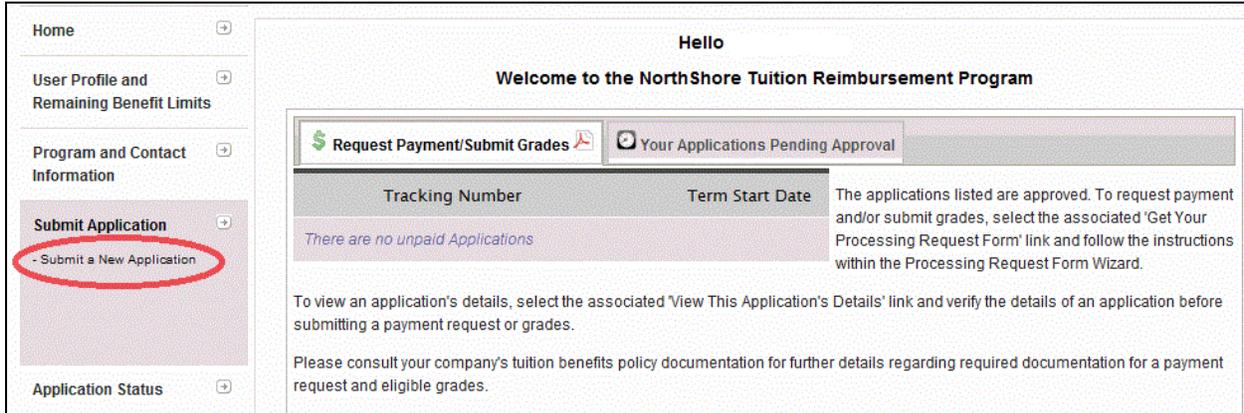
4. Complete the application. If the student completed more than four courses, you do not need to complete a second application. For flat-rate tuition (i.e., not based on credit hours), divide the total tuition by the number of courses (up to four) on your application to determine the tuition amount per course.

5. Click the ⬚Proceed button to submit the application.
6. Review the *Submit Agreement*. Select ⬚I Agree to agree to the terms. Follow the instructions on the next page to submit or cancel your application.

What if my son or daughter's major is not on the list?

If your dependent is enrolled in an undergraduate degree program at a regionally accredited institution, the major will be covered. If it does not appear on the drop-down list, you may either 1) choose an option that is the closest fit, or 2) type "other" in the "major search" feature to find additional options.

Can I change an application once I have submitted it?

Yes. Log in at https://northshore.tap.edcor.com. Select "Application Status" from the left-hand menu. A list of your past and current applications will be displayed. Find the application you want to change and click on the "Modify" icon for that application. Make your desired changes, then resubmit the application. It will be sent to your manager for reapproval.

How do I request reimbursement?

1. Once you have submitted an application, you will have the option to submit your reimbursement request later, upload and submit your payment request immediately, or create a Processing Request Form (PRF) to download, print, and fax with the grade report and receipt.
2. You must submit a grade report and an itemized receipt, tuition statement, or bill with your reimbursement request. Grades and receipts should be printed on school letterhead and include the student's name and term dates. Grade reports, statements, or receipts from an online account management system must include the school's letterhead/logo or website address (URL).
3. Itemized receipts, tuition statements, or bills must reflect:
   a. Tuition charged
   b. Fees charged
   c. Grants and/or scholarships received

4. Select "Processing Request Form" to create a PRF for your reimbursement request.

Order Your Processing Request Form

INSTRUCTIONS FOR USING THIS FORM

Please select options for creating a Processing Request Form in the **Indicate Form Use** section below (more than one reason may be selected). If you plan to submit your grades and payment information (which may include **itemized receipts, tuition statements, invoices,** etc.) with this form, you must select the options **"Grade Submission"** and **"Payment Request and/or Submit Itemized Receipt/Tuition Statement"**.

Indicate Form Use: (may select more than one)

- ☐ **Grade Submission**
- ☐ **Payment Request and/or Submit Itemized Receipt/Tuition Statement**
- ☐ **Drop Course**
- ☐ **Repayment Submission**
- ☐ **Appeal Submission**
- ☐ **Cancel Application**

    ⓘ Need Help   ▶ Next Screen

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     a. Check the "Grade Submission" and "Payment Request and/or Submit Itemized Receipt/Tuition Statement" boxes, then click the "Next Screen" button.
     b. Review the instructions and then click "Next Screen."
     c. Enter the grade and payment request information and then click "Next Screen."

Processing Request Form

GRADES SUBMISSION AND PAYMENT REQUEST

This screen shows the courses that are on your approved application. If you did not take one of the courses click on the "Not Taken" checkbox for that course line. For each course that you did complete, enter your grade and verify the amounts you paid for the course , course fees and books (if applicable). You also need to verify the sum of registration and mandatory fees you paid and the total sum of any scholarships or grants you received for these courses. You need to include receipts that verify these amounts and a copy of the grades or completion document you received from the school when you fax or upload the Processing Request Form.

Please click on the button labeled **Next Section** when you are finished with this screen or click the button labeled **Previous Section** to return to the previous screen. No information from this screen will be saved if you click Previous Section.

Please note: Do not submit a request for payment until all approved courses are completed on the application. Only one payment will be approved for this application.

Course Number	Course Name	Not Taken	Grade Value	Tuition	Course/Lab	Book
200	ENGINEERING	☐	A+	750.00	100.00	75.00

Book Tax	0.00
Book Shipping and Handling	0.00
Sum of Registration and Mandatory Fees.(This does not include course and lab fees, parking fees, late fees, fines, etc.	0.00
Sum of Scholarships and Grants, not including Loans or other funds you must repay.	0.00

    << Previous Screen   Need Help   Next Screen >>

5. Choose whether to upload the grade report and receipt through the website ("Upolad My Documents" or print the PRF to use as the cover sheet to fax the grade report and receipt to Edcor at 1-248-283-8723 ("Download Processing Request Form to Me", skip to step C).

Select Processing Request Form Submission Option

○ **Upload My Documents** - I have all of my grade and payment request documentation available on this computer and I want to upload it now.

○ **Download Processing Request Form to Me** - I want to download my Processing Request Form and use it as a coversheet to fax my grade and payment request documentation to 248-283-8723.

Do not fax documents with shading or watermarks; they will be illegible to Edcor and will delay processing of your reimbursement request.

a. If you choose to upload the grade report and receipt, follow the instructions to upload the files from your computer. Files must be in JPG, GIF, BMP, PNG, TIF, or PDF format.

You have chosen to upload your documentation. Please select file(s) on your computer by clicking the Browse button.

After successfully uploading all documents, you must click the "Submit" to complete this process."

Documentation for a successful submission
GRADE REPORT ON SCHOOL LETTERHEAD WITH STUDENT NAME
[   ] Browse...
ITEMIZED TUITION RECEIPT ON SCHOOL LETTER WITH STUDENT NAME
[   ] Browse...
ITEMIZED BOOK RECEIPT
[   ] Browse...

[<< Previous Screen]   [Need Help]

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b. Click "Submit" when files have been uploaded. You will receive a confirmation message.

c. If you choose to print the PRF to use as the cover sheet to fax the grade report and receipt to Edcor, follow the instructions to create and save the PRF.
d. Select "Grade Report" and "Itemized Tuition Receipt" and then click "Submit" to create the PRF.

e. Select "Please click here to download…" to print the PRF. Fax the grade report and itemized tuition receipt to Edcor at 1-248-283-8723, using the PRF as the cover sheet.

How will I know that Edcor received my reimbursement request?

You can verify receipt within 24 hours by accessing www.trackmystatus.com using the 16-digit tracking number assigned to the application. If you need additional assistance, you can call 1-800-326-0560 to speak with an Edcor representative.

How do I minimize the chance of rejected reimbursement requests?

- **ALWAYS use the processing request form (PRF) as the cover sheet**
  (The system uses this cover sheet to route your documents.)
- **ALWAYS upload/fax all documentation in <u>one</u> package**
  (Edcor looks at your payment request as one claim using the bundle of paperwork provided.)
- **ALWAYS upload/fax dark, clean copies of materials**
  (Illegible documents cannot be processed.)
- **ALWAYS upload/fax documents in portrait (8.5" wide x 11" long) format**

How do I appeal an application or payment rejection?

Appeals are reviewed and decided by a NorthShore program administrator.

1. Log in at https://northshore.tap.edcor.com.
2. After you log in, select "Application Status" from the left-hand menu. A list of your past and current applications will be displayed.
3. Find the rejected application you want to appeal, and click on the "View" icon.

Tracking # ▼	Term Start ⬍	Application Status ⬍	Payment Status ⬍	Requested Amount ⬍	Approved Amount ⬍	View ⬍	Modify⬍	Cancel⬍
0100-0000-0896-6985	03/28/2011	Rejected		$2350.00	$0.0	🔍 View		
0100-0000-0896-6967	05/02/2011	Rejected		$2350.00	$0.00	🔍 View		

4. When the detail page opens, click on "Get Your Processing Request Form" at the top right of the page:

Application Status Detail

Below are the details of the application.

📄 Get Your Processing Request Form

Print This Page

Tracking # 0100-0000-0896-6985 **Status** Rejected
Application Submitted On 03/21/2011 **Status**
 1. Our records indicate that you have not met the minimum length of employment required to participate in the program.
 2. The required approver was notified of your application submission but did not respond in a timely manner. The application has been rejected for lack of a response.

5. The "Order Your Processing Request Form" screen includes a checklist. Check the box for "Appeal Submission," then click the "Next Screen" button.
6. Provide the reason for your appeal in the text box provided. Try to be clear and concise.
7. If you do not have any documents to support your appeal, click the "No" selection button, then click "Submit" to submit your appeal.
8. If you have documents to support your appeal, click the "Yes" selection button.

a. You may upload your supporting documents (as PDF or image files). To use this option, select "Upload My Documents" and review the instructions.
b. Browse your hard drive or other storage media (e.g., flash drive) to find the first file to be uploaded. Double-click on the file. In a moment, you will see that the file has been uploaded. Repeat this step for each file.
c. When you have finished uploading files, click "Submit" to submit your appeal.

OR

a. If you do not have your documents available as PDF or image files, select "Download Processing Request Form to Me," then click "Submit."
b. Click "Download your Appeal Coversheet."

Appeal

Appeal Successfully Started

You indicated that you have documentation that supports your appeal. In order to proceed with processing your Appeal, you must download your appeal coversheet and fax it to us with your supporting documentation.

⬇ Download your Appeal Coversheet
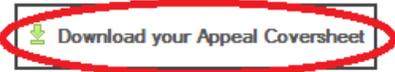
Please use this PDF document as the coversheet when you fax your documentation to us. See appeal coversheet for additional instructions.

🖨 Print This Page

If you have questions or need further assistance, please call 1-800-326-0560 between 7:00 a.m. to 9:00 p.m., CST, Monday through Friday, and a Customer Service Representative will be happy to assist you.

c. A file download will begin. Choose whether to open or save the PDF file. Open the file and print it.
d. Fax the coversheet and any documentation supporting your appeal to 248-283-8723.

Please allow 30 calendar days for the Human Resources Department to review your appeal. You will be notified by email of the decision regarding your appeal.

May I still submit paper reimbursement requests to NorthShore Human Resources?
No. Paper reimbursement requests will not be processed. All reimbursements are managed online through https://northshore.tap.edcor.com.

Where can I view the Tuition Reimbursement policy?
You can find the NorthShore Tuition Policy under the "Program and Contact Information" tab on the Edcor Home page, or access it from the NorthShore PULSE site in Employee Services.

What's in it for me?

The benefits of the Edcor system include:

- Web-based processing that gives you the ability to submit applications when it's convenient for you, and not based on any individual's availability;
- Immediate access to your own personal data for tracking purposes;
- Timely and consistent processing of your tuition reimbursement requests;
- The ability for you to have your dependents submit their own grade reports and tuition statements using the unique Dependent ID you create for them; and
- Access to discounts through Edcor's Preferred School Network, located on their website.

What if I have further questions?

- You can call Edcor's Customer Service Line at 1-800-326-0560.
- Access Edcor's User Guide: https://northshore.tap.edcor.com/ui/img/sbsTAPReimburseOnly.pdf
- Access Edcor's Processing Request Wizard Guide: https://northshore.tap.edcor.com/ui/img/prf2wizardhelp.pdf
- Contact Susan Abraham at 847-570-5336 or the tuition reimbursement coordinator at TuitionReimbursement@northshore.org.