

# Inves+ing in You

Career • Culture • Financial Security • Well-being

Edward Jones



## Tuition Program FAQs

### 1. How can I contact EdAssist?

Edward Jones has contracted with EdAssist/Bright Horizons to manage the tuition reimbursement program. EdAssist will be the single point of contact for you to submit tuition reimbursement applications.

Submit applications via the program website <https://edwardjones.edassist.com>

First time logging in? User name: EdwardJones Password: Benefits4You

- Email: [EdwardJonesTuitionProgram@EdAssist.com](mailto:EdwardJonesTuitionProgram@EdAssist.com)
- Website: <https://edwardjones.edassist.com>
- Phone: 866-286-1016
- Fax: 1-855-687-7636

Customer service representatives will be able to assist you Monday through Friday from 9am-5pm, Central Time. If you leave a voicemail message, your call will be returned within the next business day.

### 2. What are the program eligibility requirements?

Associate eligibility, program/course eligibility, eligible expenses, grade requirements, annual cap, and repayment information can be found in the Tuition Academic Program Guidelines.

### 3. How does Financial Aid affect my application?

Participants receiving grants, scholarships and/or Veteran's Administration benefits should fully utilize these funding sources prior to requesting funds through the Tuition Program. All financial aid must be disclosed on the tuition assistance application when used concurrently with the Tuition Program.

### 4. What is the Featured Provider Network (FPN)?

EdAssist has established a network of Colleges and Universities to increase the value of your tuition assistance dollars. Essentially, each institution has agreed to provide a discount and/or other meaningful benefits to each of EdAssist's client companies. The list of institutions participating in the EdAssist FPN program is available on the program website home page.

### 5. How can I find out if my school is properly accredited?

All academic courses must be provided by an institution holding Regional Accreditation recognized by the US Department of Education.

You can verify your school's regional accreditation by:

- Using the [Office of Post Secondary Education College Search Tool](#),
- Checking the school's website to verify accreditation, or
- Calling the school and asking for the name of their accrediting agency.

#### 6. **What is pre-approval and when is it required?**

Pre-Approval is required before pursuing any academic program (HO, FA, BOA) or designation (HO only; information for designations for FA's can be found on WEB097972, BOA's are not eligible for designations).

Pre-Approval for an academic course confirms the program/course can be considered as career development at Edward Jones and you are in good standing with the firm. Pre-Approval for a designation confirms the designation is strongly recommended for your current position and you are in good standing with the firm.

To obtain the pre-approval:

- HO Associates should discuss their desire to pursue the program/course with their leader. The leader will be asked to confirm the pre-approval discussion at the time of application review.
- FA's should send an e-mail to [FATP-Approvals@edwardjones.com](mailto:FATP-Approvals@edwardjones.com) to request pre-approval to participate in the tuition program, per the eligibility guidelines. FADS will be asked to confirm the pre-approval discussion at the time of application review.
- BOA's should discuss their desire to pursue the program/course with their FA. The FA will be asked to confirm the pre-approval discussion at the time of application review.

#### 7. **Do I need to submit an application for Tuition Assistance?**

Yes, all associates are required to submit a new application via the program website prior to each semester, term or individual course start date. Applications should be submitted at least 2 weeks but no more than 60 days prior to the course start date. Applications submitted more than 60 days after the course end date for the Academic Program will be denied. You must submit an individual application per each course or module.

#### 8. **How do I submit an application?**

To submit an application, visit the Tuition Assistance Program website at <https://edwardjones.edassist.com> and follow the instructions for logging onto the site.

Once logged into the website:

- Select "New Application" from the Main Menu.
- Click the "Create New Application" button and complete Steps 1-6 of the application wizard.
- Once you have completed Step 6 and you are ready to submit your application to EdAssist for review, click the "Submit" Button. You will receive an on-screen confirmation and application number when you have successfully submitted your application.

#### 9. **What if I cannot find my school when using the "Search for Provider"?**

If you are unable to find your school using the "Search for Provider" tool on Step 3 of the online

application, please contact EdAssist at [EdwardJonesTuitionProgram@EdAssist.com](mailto:EdwardJonesTuitionProgram@EdAssist.com) or 866-286-1016 for assistance. If the school meets the policy guidelines for accreditation, your school will be added to the list of eligible educational providers. If you can find your school but can't find your school location, please select the nearest location.

**10. What if I cannot complete all information on the application?**

You can enter the information you have, save the application and then later edit the application with the additional information. You cannot submit your application until all information is complete. If your application information is incomplete at the time of application submission, you will receive a message with instructions for completing and resubmitting your application or you will receive an email that requests additional information needed to review/approve the application. The review process will resume upon receipt of the missing information.

**11. What happens after I submit my application?**

EdAssist will review applications to verify compliance with the program policy and ensure the associate has funds available for the corresponding benefit period. Upon successful review by EdAssist, the associate's leader/approver will receive an email with a link to the program website to provide his/her final approval of the application. When the review process is complete, the associate will receive an email with the status (approved or denied) of the application. Associates are also encouraged to monitor the status of their application on the program website or through the Interactive Voice Recording (IVR).

**12. What should I do if I feel my application was inappropriately denied?**

If you feel your application was denied in error, you may submit a request for reconsideration to EdAssist via email at [EdwardJonesTuitionProgram@EdAssist.com](mailto:EdwardJonesTuitionProgram@EdAssist.com). Reconsideration requests must be submitted within 30 days of the original denial of tuition assistance.

**13. How do I get reimbursed for my approved courses?**

Tuition Academic Program: Upon application approval, the associate will receive payment for their courses by submitting an itemized school invoice to EdAssist either by using the document upload feature of the program website or by faxing or emailing the information using the fax coversheet available on the website. EdAssist will use this invoice to verify the tuition amounts entered on your application and approve the payment accordingly. Once approved, you will receive a payment processed email. Immediate reimbursements for tuition will be disbursed via company payroll within 1-2 pay cycles after payment processing is complete. The associate is responsible for paying the funds to the school. The associate is then responsible for submitting proof of successful course completion within 60 days of course completion.

**14. Where and how do I submit my documents?**

Reimbursement documentation may be submitted via document upload on the program website, email, or fax:

- Website: <https://edwardjones.edassist.com>
- Email: [EdwardJonesTuitionProgram@EdAssist.com](mailto:EdwardJonesTuitionProgram@EdAssist.com)
- Fax: 1-855-687-7636

To use the document upload feature you can log onto the website. From the Home page, click on the "My History" section on the top left hand side of the website. Use the drop down box to

select the correct benefit year. Select the Application and from the menu on the right side select UPLOAD. The Upload page will be displayed, select the type of document to upload, Grades and/or Receipts. Click the Browse button to search for the document then select the document and click open – click on Upload. You will receive a notification when your document(s) has been received.

To ensure proper routing of your faxed or emailed documents, please include an EdAssist Fax Cover Sheet. To get the Fax Cover Sheet, first open the application that is related to the documents you wish to submit. In the right-hand column of the application, click the “Fax Cover” button, and the Cover Sheet is displayed. Fill in the blanks and click the “print” button. Please remember to keep a copy of these documents for your records.

#### 14. When will I receive my reimbursement?

Associates will be notified via email of successful payment processing. Payments will be disbursed via regular payroll within 1-2 pay cycles of receiving notification from EdAssist of payment processing.

#### 15. Can I be denied reimbursement of an approved course?

An associate will be ineligible for reimbursement if he/she:

- fails to meet the minimum grade/successful completion requirement for a course,
- fails to submit proper documentation required for reimbursement within the submission deadline,
- withdraws from a course,
- does not successfully complete an incomplete course to be able to submit grades/successful completion report within the submission deadline,
- provides incomplete or inaccurate application information or reimbursement documentation, or
- submits documentation that is not legible or has been altered in any way.

#### Contact

EdAssist will be the **single point of contact for you** to submit tuition reimbursement applications.

You can reach the program administration, EdAssist, through the following contact information:

Email: [EdwardJonesTuitionProgram@EdAssist.com](mailto:EdwardJonesTuitionProgram@EdAssist.com)

Website: <https://edwardjones.edassist.com>

Phone: (866) 286-1016

Fax: (855) 687-7636

Customer service representatives will be able to assist you Monday through Friday from 9am- 5pm, Central Time. If you leave a voicemail message, your call will be returned within the next business day.

If you still have questions after speaking with EdAssist, you may contact the Tuition Program at extension 5-9024 or [TuitionProgram@edwardjones.com](mailto:TuitionProgram@edwardjones.com).