



TAP/TRP APPROVAL PROCESS FOR MANAGERS/SUPERVISORS

When a staff member who reports to you submits a Tuition Assistance Program (TAP) or Tuition Reimbursement Program (TRP) form for a job-related, graduate-credit course, **you will be required to review and attest that the course meets IRS standards – your timely approval is very important.*** The process is as follows:

- Your direct-report submits a TAP or TRP form through the [Tuition Portal](#) and indicates one or more of the courses meet the IRS-standard of job-relatedness.
- The form includes a Job-Relatedness Attestation section where they must indicate the job-related education that will be learned in the course. **Your approval is required in order for the course to be deemed job-related.**
- You will receive an email from Benefit Strategies (no-reply@benstrat.com) with step-by-step approval instructions. The email will have a PDF of the TAP/TRP form attached, a submission ID code, and a link to the Supervisor Approval Form. You will need to do the following:
 1. Review the TAP/TRP form to determine whether you agree the courses meet the [IRS standard of job-relatedness](#). **Please note**, employees can submit multiple courses on one form and may have designated only some of them as meeting the IRS-standard of job-relatedness.
 2. Copy the submission ID from the email and click on the link to the Supervisor Approval Form.
 3. Paste the submission ID into the “Request Submission ID” field.
 4. Select the total number of courses listed on the TAP/TRP form (Course 1 on the TAP/TRP form will correspond to Course 1 on the approval form, and Course 2 with Course 2 and so on).
 5. For each course, select whether the job-relatedness attestation is:
 - *Approved* - you agree based on the job skills that will be learned, the course meets the IRS-standard of job-relatedness
 - *Denied* – you do not agree the course meets the IRS-standard of job-relatedness
 - *N/A* – the employee indicated the course does not meet the IRS-standard of job-relatedness
 6. Click submit.

*If your approval is not received by the posted deadline, TAP benefits on graduate-credit courses may be treated as taxable income to the employee; and TRP reimbursement may not be granted.

