

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

Pre-Approval Request

Employees will submit a pre-approval request online with the documentation listed below BEFORE the expense is incurred.

- Employee must provide a pre-approval request form with supervisor's signature.
- MEA represented employees do not complete a form.
- Forms are located on DHR's tuition webpage located at http://sfdhr.org/online-tuition-reimbursement-process

Sample pre-approval request forms:

General Tuition Reimbursement Request Form

Form for General Tuition Reimbursement Request. Includes instructions, employee information fields, and a grid for course selection with checkboxes for various categories like Academic, Professional, and Personal.

Local 21 EDF Form

Form for Local 21 EDF (Employee Development Fund) Reimbursement Request. Includes instructions, employee information, and a grid for course selection with checkboxes for categories like Professional, Technical, and Personal.

Teamsters, Local 856, Supervising Nurses Form

Form for Teamsters Local 856 Supervising Nurses EDF Reimbursement Request. Includes instructions, employee information, and a grid for course selection with checkboxes for categories like Professional, Technical, and Personal.

UAPD EDF Form

Form for UAPD EDF (Union of Amalgamated Police and Detectives) Reimbursement Request. Includes instructions, employee information, and a grid for course selection with checkboxes for categories like Professional, Technical, and Personal.

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Employee must upload **estimated expense(s)** supporting documentation.

Sample Registration Form

The image shows a sample registration form for the APHA 2015 Annual Meeting & Expo. A red box highlights the header information: "149th ANNUAL MEETING & EXPO OCT 24-NOV 4, 2015 CHICAGO". A red arrow points from this box towards the right side of the page, indicating the location of the conference.

To demonstrate conference location

The employee can also provide an email from the vendor which states the conference location and registration fee.

Please Note: Travel within the Nine Bay Area Counties is not a reimbursable expense for Local 21 Represented Employees. The Nine Bay Area Counties include: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma.

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

If the employee is flying to the conference location, he/she must provide comparative **air fare quotes.**

- Employee must provide comparative quotes for a roundtrip ticket from the San Francisco Bay Area direct to the conference/training location.
- A quote from a City travel agent qualifies as a comparative air quote. The City’s travel agencies are: Clement Travel Service and Orientex Travel.
 - Clement Travel Service, Jack Young, 415-386-2535, clementtravelservice@gmail.com
 - Orientex Travel, Francis, 415-788-1711, orientex447@sbcglobal.net
- Flight must be economy or coach class only. Upgrades are not reimbursable.
- Same day or near day tickets purchases are not reimbursable.
- Travel insurance is not a reimbursable expense.

Sample Quote from City Travel Agent

 Sent: Tuesday, February 17, 2015 11:54 AM
 To: [REDACTED]
 Subject: Fare quote to Seattle

[REDACTED]

FEB 17 2015 INVOICEITIN NOB4RS
 17 APR 15 - FRIDAY
 SOUTHWEST 2863 COACH CLASS EQUIP-73W
 DEPART TERMINAL-2
 LV: OAKLAND 1055A NONSTOP MILES- 672 CONFIRMED
 AR: SEATTLE 1255P ELAPSED TIME- 2:00

21 APR 15 - TUESDAY
 SOUTHWEST 1084 COACH CLASS EQUIP-73W
 LV: SEATTLE 225P NONSTOP MILES. 672 CONFIRMED
 AR: OAKLAND 425P ELAPSED TIME- 2:00
 ARRIVAL TERMINAL-2

** AIR FARE SUBJECT TO CHANGE BY AIRLINE UNTIL TICKET IS ISSUED
 ** IF THE LOWER INSTANT PURCHASE FARE IS AVAILABLE
 ** WHEN WE RECEIVE THE APPROVAL TO ISSUE THE TICKET
 ** WILL ISSUE THE INSTANT PURCHASE FARE

AMOUNT	234.42	TAX	45.78	TTL	280.20	
		SUB TOTAL			280.20	
		AMOUNT DUE			280.20	← Price Estimate

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

If the employee is staying overnight near the conference location, he/she must provide a **lodging quote**.

- The employee must provide the conference brochure with hotel rates included.
- If there is no conference sponsored lodging, the maximum reimbursement rate is the Federal per-diem rate. The Federal per-diem rates are located online at <http://www.gsa.gov/portal/content/104877>.
- **If the employee chooses non-conference sponsored lodging, the maximum reimbursement rate is the Federal per-diem rate.**

Sample Conference Sponsored Lodging with Hotel Rates



What is Public Health? Topics & Issues Policy & Advocacy Publications & Periodicals Professional Development Events & Meetings News & Media

APHA > Events & Meetings > Annual Meeting > Travel and Housing > Hotel Room Rates

Hotel Room Rates

< Events & Meetings
< Annual Meeting
Travel and Housing



1. Best Western Grant Park 1100 S. Michigan Ave.
2. Embassy Suites Lakefront 311 N. Columbus Dr.
3. Essex Inn 800 S. Michigan Ave.
4. Fairmont 200 N. Columbus Dr.
5. Hilton Chicago 725 S. Michigan Ave.
6. Hyatt Regency Chicago 131 E. Upper Wacker Dr.
7. Hyatt Regency McCormick 225 S. Dr. Martin Luther King Dr.
8. InterContinental 505 N. Michigan Ave.
9. Palmer House Hilton 17 E. Monroe St.
10. Sheraton 301 E. North Water St.
11. Swissotel Chicago 323 Upper Wacker Dr.

2015 Hotel Room Rates

1. Best Western Grant Park Hotel	\$189/\$189	7. Hyatt Regency McCormick**	\$253/\$253
2. Embassy Suites Chicago Downtown Lakefront	\$231/\$231	8. InterContinental	\$209/\$209
3. Essex Inn*	\$159/\$159	9. Palmer House Hilton*	\$229/\$229
4. Fairmont Chicago Millennium Park*	\$228/\$228	10. Sheraton Chicago Hotel & Towers Hotel**	\$225/\$225
5. Hilton Chicago*	\$229/\$229	11. Swissotel Chicago	\$209/\$209
6. Hyatt Regency Chicago*	\$229/\$229		

Sample Per Diem Rates



Cities not appearing below may be located within a county for which rates are listed. To determine what county a city is located in, visit the [National Association of Counties \(NACo\) website](#) (a non-federal website).

The following rates apply for Chicago, Illinois		Max lodging by Month (excluding taxes)											
Primary Destination* (1)	County (2, 3)	2014			2015								
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Chicago	Cook/Lake	194	184	132	132	132	159	159	192	192	192	192	194

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

If the employee is driving to the conference location, he/she must provide a **mileage estimate**.

- The Controller’s Office adopts the IRS standard mileage rate for business use of an automobile; refer to the IRS’s website to obtain the most updated rate (<https://www.irs.gov/Credits-&-Deductions/Individuals/Standard-Mileage-Rates-Glance>).
- The employee will provide an online map with number of miles between worksite/home and conference/training location (For example, to Sacramento, CA or Monterey, CA).

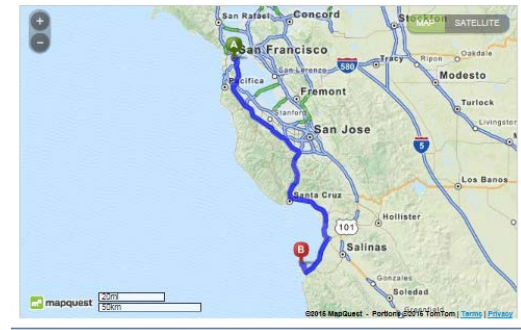
Number of miles



Trip to:
800 Asilomar Blvd
Pacific Grove, CA 93950-3704
120.70 miles / 2 hours 6 minutes

Step	Instruction	Distance	Total
1	Start out going north on S Van Ness Ave / US-101 N toward Market St.	0.03 Mi	0.03 Mi Total
2	Take the 1st right onto Market St.	0.1 Mi	0.2 Mi Total
3	Take the 2nd right onto 10th St.	0.6 Mi	0.8 Mi Total
4	Merge onto US-101 S via the ramp on the left toward San Jose.	9.7 Mi	10.4 Mi Total
5	Merge onto I-380 W via EXIT 423B toward I-280 / San Bruno.	1.8 Mi	12.2 Mi Total
6	Merge onto I-280 S / Junipero Serra Fwy S via EXIT 5B on the left toward San Jose.	31.5 Mi	43.7 Mi Total
7	Merge onto CA-85 S / Norman Y Mineta Hwy via EXIT 12B toward Gilroy.	7.7 Mi	51.4 Mi Total
8	Merge onto CA-17 S via EXIT 11A toward Santa Cruz.	22.0 Mi	73.4 Mi Total
9	Merge onto CA-1 S via EXIT 1B toward Watsonville / Monterey.	42.8 Mi	116.2 Mi Total
10	Take the CA-68 W exit, EXIT 399A, toward Pacific Grove / Pebble Beach.	0.3 Mi	116.5 Mi Total
11	Turn right onto Holman Hwy / CA-68. Continue to follow CA-68.	3.1 Mi	119.6 Mi Total
12	Turn left onto Sunset Dr / CA-68.	0.9 Mi	120.5 Mi Total
13	Turn right onto Asilomar Blvd / CA-68.	0.3 Mi	120.7 Mi Total
14	800 ASILOMAR BLVD is on the left.		

Total Travel Estimate: 120.70 miles - about 2 hours 6 minutes



- Please note that mileage to Los Angeles, San Diego, Las Vegas and/or Seattle is reimbursable up to the price of an air fare quote.

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

Public transportation/Shuttle/Taxi estimate

Worksite/Home to Airport

- Taxi-\$50 maximum each way, including tip, for \$100 total.
- Personal Car-\$15 maximum each way, for \$30 total.
- Parking is limited to long-term parking only, maximum of \$18 per day, and up to \$120 total.

Sample Public Transportation Estimate (BART)

The screenshot shows the BART fare estimator interface. It displays a one-way fare of \$8.65 and a round-trip fare of \$3.20* for a trip from Civic Center/UN Plaza (SF) to San Francisco Int'l Airport. Below the fare information is a map of the BART system with the route highlighted in red, showing the path from the city center to the airport.

Sample Transportation from Airport to Conference Location/Lodging (Super Shuttle)

The screenshot shows the SuperShuttle website interface. It displays reservation details for a van service from an airport to a conference location. The reservation summary shows a trip from Orange County-John Wayne - SNA to Anaheim Convention Center. The rates section shows two service options: Shared Ride Van Service and Exclusive Non-Stop Van Service. The Shared Ride Van Service has a first passenger rate of \$26.00, while the Exclusive Non-Stop Van Service has a first passenger rate of \$84.00. Both services have a fuel surcharge of \$0.00 and a maximum of 9 passengers.

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

Reimbursement Request

Employees will submit a reimbursement request online with the documentation listed below when they can provide proof of attendance/successful completion.

If the employee flew to the conference, the employee must provide an air fare itemized receipt and proof of payment.

- Flight must be economy or coach class only. Upgrades are not reimbursable.
- Same day or near day tickets purchases are not reimbursable.
- Only one checked bag is reimbursable.
- Travel insurance is not a reimbursable expense.

Sample air fare receipts

Upcoming Trip: 05/31/15 - Salt Lake City

AIR Itinerary

AIR Confirmation: [REDACTED] Confirmation Date: 04/28/2015

Passenger(s)	Rapid Rewards #	Ticket #	Expiration	Est. Points Earned
[REDACTED]	[REDACTED]	[REDACTED]	Apr 27, 2016	[REDACTED]

Rapid Rewards points earned are only estimates. Visit your (MySouthwest, Southwest.com or Rapid Rewards) account for the most accurate totals - including A-List & A-List Preferred bonus points.

Date	Flight	Departure/Arrival
Sun May 31	287	Depart OAKLAND, CA (OAK) on Southwest Airlines at 3:55 PM Arrive in SALT LAKE CITY, UT (SLC) at 6:30 PM Travel Time: 1 hr, 35 mins Wanna Get Away

What you need to know to travel:

- Don't forget to check in for your flight(s) 24 hours before your trip on southwest.com or your mobile device. This will secure your boarding position on your flights.
- Southwest Airlines does not have assigned seats, so you can choose your seat when you board the plane. You will be assigned a boarding position based on your check-in time. The earlier you check in, within 24 hours of your flight, the earlier you get to board.
- WiFi, TV, and related services and amenities may vary and are subject to change based on assigned aircraft. [Learn more.](#)

Remember to be in the gate area on time and ready to board:

- 30 minutes prior to scheduled departure time: We may begin boarding as early as 30 minutes prior to your flight's scheduled departure time. We encourage all passengers to plan to arrive in the gate area no later than this time.
- 10 minutes prior to scheduled departure time: All passengers must obtain their boarding passes and be in the gate area available for boarding at least 10 minutes prior to your flight's scheduled departure time. If not, Southwest may cancel your reserved space and you will not be eligible for desired boarding compensation.
- If you do not plan to travel on your flight: In accordance with Southwest's No Show Policy, you must notify Southwest at least 10 minutes prior to your flight's scheduled departure if you do not plan to travel on the flight. If not, Southwest will cancel your reservation and all funds will be forfeited.

Air Cost: \$151.00

Carryon Items: 1 Bag + small personal item are free. See full details. Checked Items: First and second bags fly free. Weight and size limits apply.

Fare Rule(s): 5282104083292 NONREFUNDABLE/STANDBY REQ UPGRADE TO Y.

Valid only on Southwest Airlines. All travel involving funds from this Confirmation Number must be completed by the expiration date. Unused travel funds may only be applied toward the purchase of future travel for the individual named on the ticket. Any changes to this itinerary may result in a fare increase. Failure to cancel reservations for a Wanna Get Away fare segment at least 10 minutes prior to travel will result in the forfeiture of all remaining unused funds.

[REDACTED]

Learn About Our Boarding Process **EARLYBIRD CHECK-IN** Get EarlyBird Check-In® Details

Cost and Payment Summary

Item	Amount	Payment Information
Base Fare	\$ 127.35	Payment Type: Visa XXXXXXXXXX [REDACTED]
Excise Taxes	\$ 9.55	Date: Apr 28, 2015
Segment Fee	\$ 4.00	Payment Amount: \$151.00
Passenger Facility Charge	\$ 4.50	
September 11th Security Fee	\$ 5.60	
Total Air Cost	\$ 151.00	

ITINERARY & RECEIPT

YOUR TRIP: SFO SEA CONFIRMATION [REDACTED]

ITINERARY
Round Trip - San Francisco to Seattle, Seattle to San Francisco
DATE: Apr 17 - Apr 21

WHO'S FLYING?

GUEST(S)	TICKET NUMBER	FREQUENT FLYER PROGRAM	FREQUENT FLYER #	POINTS
[REDACTED]	[REDACTED]	Virgin America (330000)	[REDACTED]	[REDACTED]

DEPARTING FLIGHT 704

FROM	TO	DATE	CABIN
SFO	SEA	Fri, 04/17/2015	Main Cabin

12:55 PM - 2:55 PM

RETURNING FLIGHT 753

FROM	TO	DATE	CABIN
SEA	SFO	Tue, 04/21/2015	Main Cabin

10:40 AM - 12:45 PM

PAYMENT INFORMATION

Payment By Credit Card
Card Type: Visa
Cardholder Name: [REDACTED]
Card Number: XXXXXXXXXXXX [REDACTED]
Payment Amount: \$151.00

BILLING ADDRESS

[REDACTED]
United States

TRANSACTION SUMMARY

Original Transaction: Feb 9, 2015 \$146.20

PRICE DETAILS

Base Fare (x1)	\$127.35
Excise Taxes (x1)	\$9.55
Domestic Taxes and Fees	\$14.10
September 11th Security Fee	\$5.60
Passenger Facility Charge	\$4.50
Total For 1 person	\$146.20

Both samples list the employee's name, base fare, no extra fees, flight itinerary, fare type (Southwest's "Wanna Get Away" fare or economy/coach), and method of payment. If an additional fee is incurred (such as early boarding), the fee will be deducted.

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests

- If the employee is requesting lodging expenses, the employee must provide a **lodging itemized receipt and proof of payment.**
 - If the employee stayed at conference sponsored lodging, the employee will be reimbursed at the conference rate.
 - If the employee chooses non-conference sponsored lodging, the maximum reimbursement rate is the Federal per-diem rate.

Conference Sponsored Lodging (Proof included with Pre-Approval Request)

Conference Rate →

Host Hotel	Single	Double
Sheraton Seattle SOLD OUT 1400 6th Ave 1-800-821-7056	\$227	\$227
The Mayflower Hotel 405 Olive Way 7 blocks to convention center Access Code: APA15	\$185	\$185
The Westin Seattle 1900 5th Avenue 5 blocks to convention center Deadline: March 19, 2015	\$231	\$231
Fairmont Olympic Hotel 411 University Street 4 blocks to convention center Deadline: March 19, 2015	\$239	\$239
Crowne Plaza Seattle Downtown SOLD OUT 1113 6th Ave. 1-888-233-9527	\$219	\$219
Motif Seattle SOLD OUT	\$199	\$199

Lodging Itemized Receipt

Conference Rate →

Date	Reference	Description	Charges (USD)	Credits (USD)
17-APR-15	R11260	Room Chrg Grp Association	227.00	
17-APR-15	R11260	Room Tax	35.41	
17-APR-15	R11260	Seattle Tourism Assessment	2.00	
18-APR-15	R11260	Room Chrg Grp Association	227.00	
18-APR-15	R11260	Room Tax	35.41	
18-APR-15	R11260	Seattle Tourism Assessment	2.00	
19-APR-15	R11260	Room Chrg Grp Association	227.00	
19-APR-15	R11260	Room Tax	35.41	
19-APR-15	R11260	Seattle Tourism Assessment	2.00	
20-APR-15	R11260	Room Chrg Grp Association	227.00	
20-APR-15	R11260	Room Tax	35.41	
20-APR-15	R11260	Seattle Tourism Assessment	2.00	
21-APR-15	VM	Visa/MasterCard		-1057.54
Free Authorization Purpose Only				
Date	Code	Authorized		
17-APR-15	54315P	1316.5		
** Total			1027.04	-1057.54
*** Balance			-0.00	

- If the employee is requesting **mileage**, the employee must provide **odometer readings** (between worksite/home and the destination).
- If the employee is requesting **Public Transportation/Shuttle/Taxi**, the employee must provide **itemized receipt(s) and proof of payment.**

Online Tuition Reimbursement Program Reference Documentation Checklist With Examples for Travel Requests



Proof of Attendance/Successful Completion

- The employee must provide **proof of successful completion/attendance** for the main conference. The employee can provide an email from the vendor confirming his/her attendance.
- If the employee attended a pre-conference, or additional workshops (that requires a fee separate from the main conference fee), the employee must provide **proof of attendance for the main event and each additional conference event.**

Sample Proof of Attendance



Sample Letter from Vendor



Sample Conference Name Badges



Sample Name Badge versus Unacceptable Name Badge

