

- DHR Tuition Reimbursement Process Webpage is now Available at:
Tuition Reimbursement - SF My Portal



SF | My Portal

Employee Essentials ▼ Workplace Policies ▼ **Classes and Training ▲** Knowledge Bases News Center

Training Workshops	Educational Support Programs	Online Trainings
Individual Learners	<u>Tuition Reimbursement</u>	Employee Online Trainings
Management Training	SEIU Work Training Program	SF Learning
Organizational Development	City University	





FY 2025-2026

Tuition Reimbursement Program

(All meetings presenting same material)

- July 17th, 2:00pm – 3:00pm
- July 21st, 10:00am – 11:00am
- July 22nd, 12:00pm - 1:00pm
- July 23rd, 9:30am-10:30am



Topics of Discussion

- Introductions
- Eligibility
- Process Overview-Phase 1: Expense Authorization (EA)
- Supporting Documentation
- Process Overview-Phase 2: Expense Report (ER)
- Reminders and Common Questions
- Resources Available
- Questions and Answers

- Introductions
- This presentation does not cover department reimbursement processes
- If you have a required license, check with your department first
 - SEIU Local 1021 Staff Nurses should check with DPH on reimbursement for Mandatory State of California Nursing Licenses
- Questions will be answered during questions and answers period at the end of the presentation



What are Eligible Expenses



- The Tuition Reimbursement Program provides City employees with funds for professional development.
- Employees should refer to their MOU for a comprehensive list of eligible expenses
- [Labor agreements with the City and County of San Francisco \(MOUs\) | SF.gov](#)



Who is Eligible (Example) and When

Employee Organization	Waiting Period Before Employee Can Submit Request*
Laborers, Local 261	1-year continuous service in any class and whose work schedule is 20 hours or more per week
Local 21	1-year continuous service as a City employee and whose regular work schedule is 20 hours or more per week
Municipal Executives Association	1-year continuous service in any classification represented by MEA and whose work schedule is 20 hours or more per week
SEIU 1021 Citywide	1-year continuous service in any classification represented by the Union and whose work schedule is 20 hours or more per week
SEIU 1021 Nurses	1-year of continuous permanent service and whose regular work schedule is 0.4 or more FTE
Teamsters, Local 856 Supervising Nurses	1-year continuous service in any class and whose work schedule is 20 hours or more per week
Teamsters, Local 856 Multi-Unit	1-year continuous service in any class and whose work schedule is 20 hours or more per week

**Waiting Period for FY2025/2026*



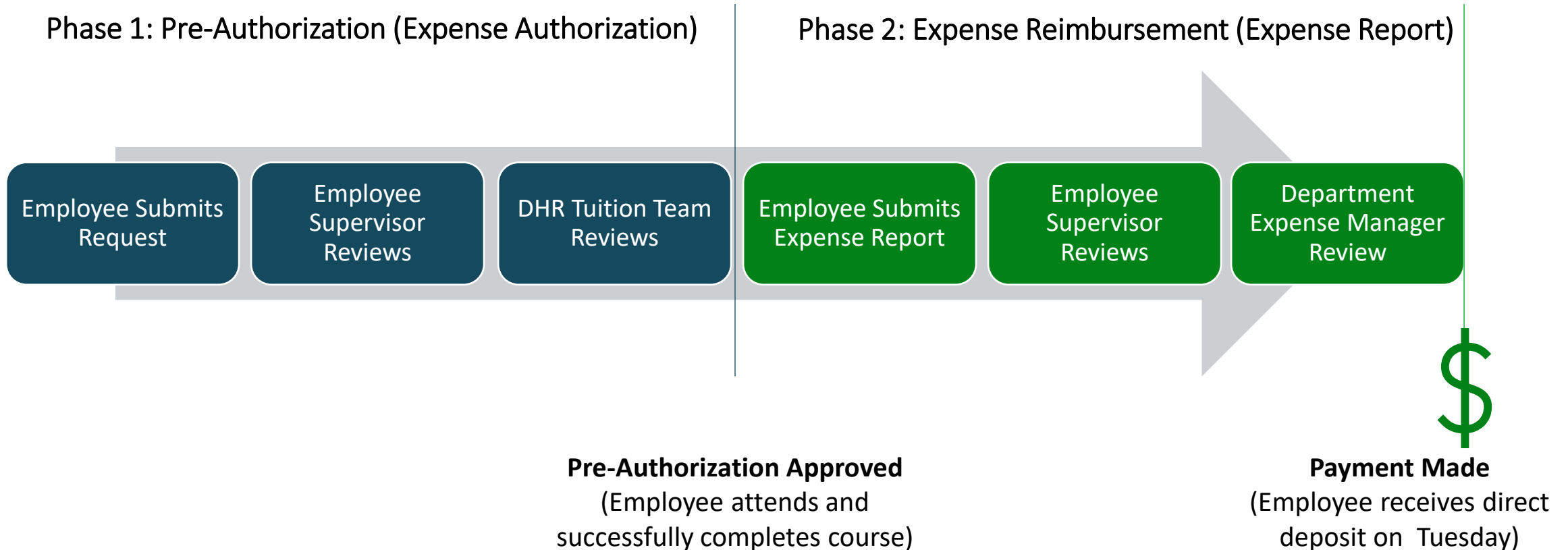
Waiting Period Example



- MOU requires one year of service and employee's one year of service is met 8/7/2025
- Employee NOT eligible for course taken in June 2025
- Employee can only submit expenses starting from the date the employee qualifies for tuition reimbursement

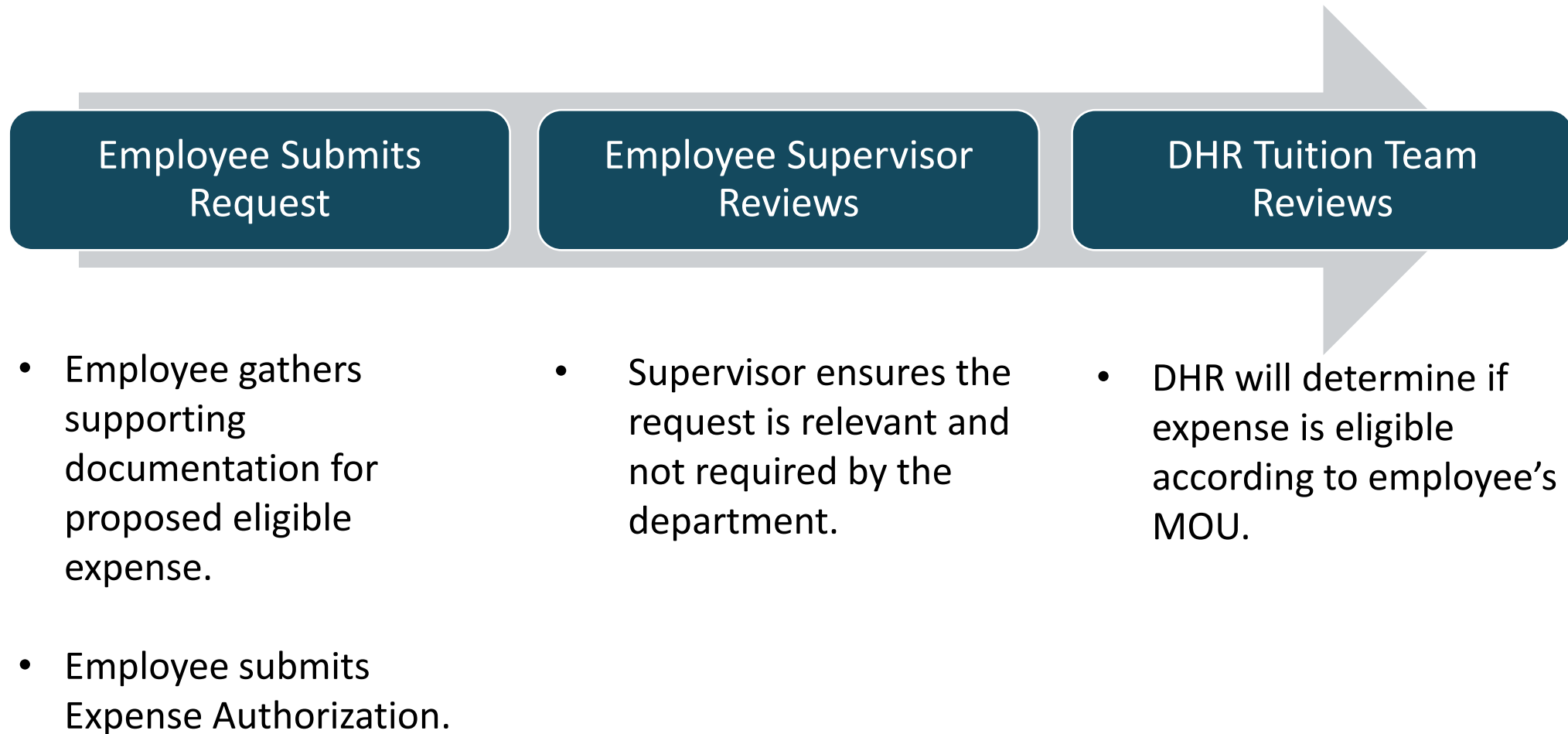


Process Overview





Phase 1: Expense Authorization



Log into Employee Gateway

Welcome to the
SF Employee Gateway



Citywide Enterprise Applications



SF | My Portal
Employee Login



SF Employee Support
(415) 944-2442

My Expense Tile

My Applications

Filter

All (11)

Recently opened (8)

Categories

Benefits (3)

My Tools (9)

My Info (7)

Payroll & Compensation (3)

Sort by A-Z

Featured



My Time & Leave
Balances

Featured



SF My Hub



Commuter
Benefits



DT ServiceNow



My Employee
Profile



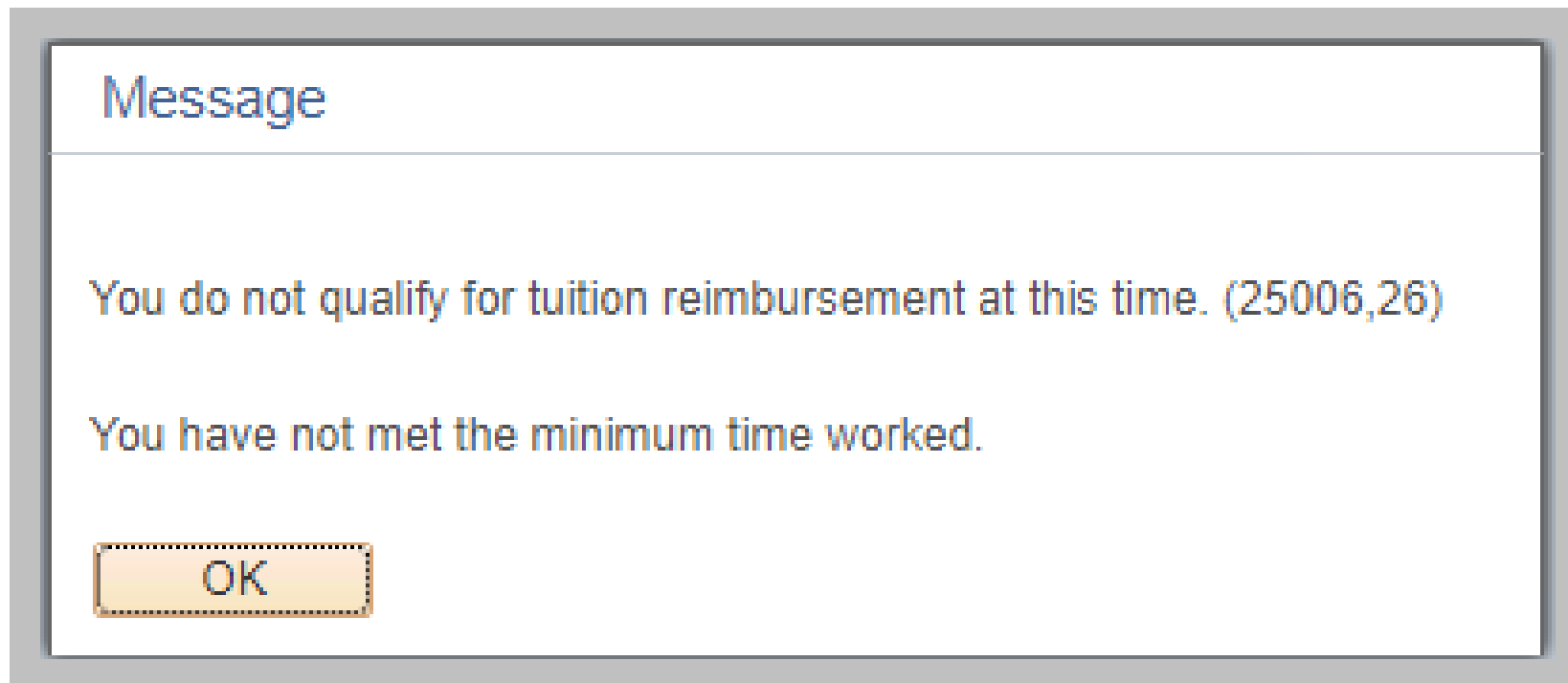
My Expenses



Create Expense
Authorization

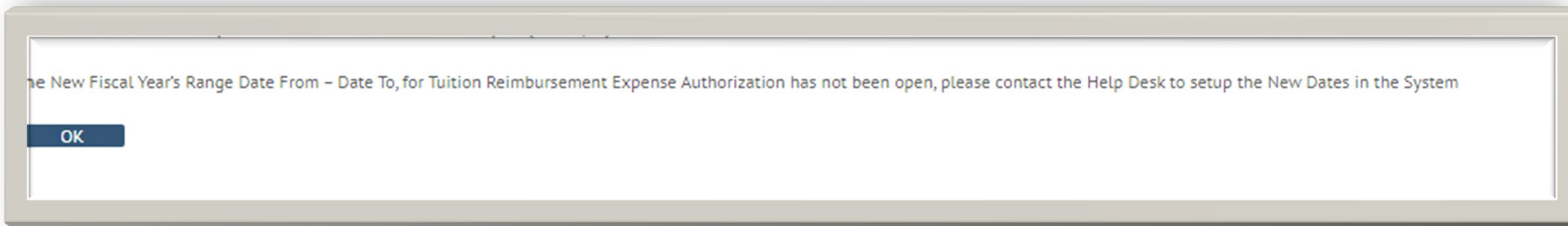
DHR Error Messages

- If employees are not eligible for tuition reimbursement, they will see an error message.

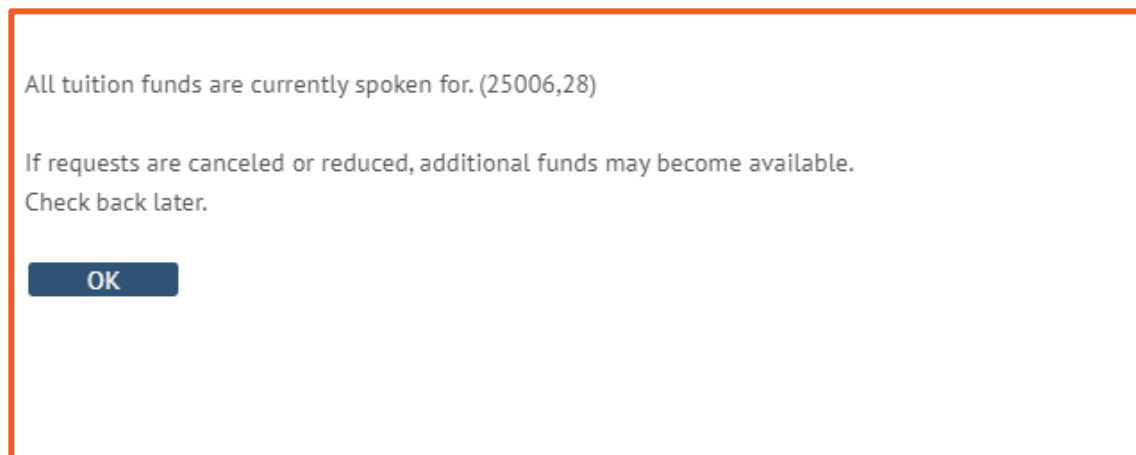


DHR System Messages

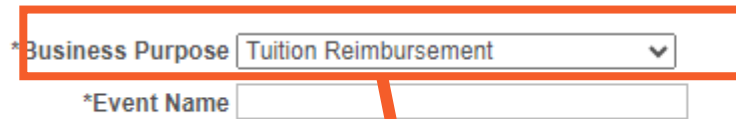
- System Not Open



- No Funds Available

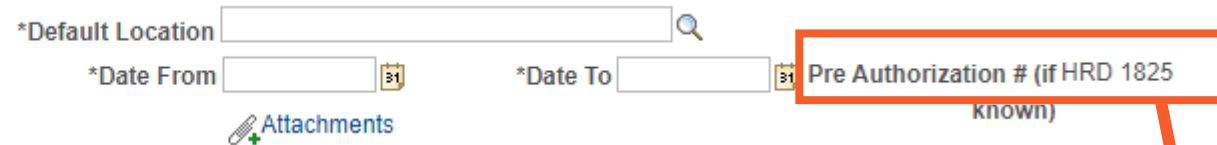


DHR Mandatory Field



*Business Purpose

*Event Name



*Default Location

*Date From

*Date To

Pre Authorization # (if HRD 1825 known)

Select **Tuition Reimbursement**

- The field triggers the correct workflow (to DHR or MEA).
- All expenses (such as travel, membership, books, etc.) need to select Tuition Reimbursement.

- Once selected, the pre-authorization field will automatically populate the department and job class

DHR Event Name and Date Fields

Expense Authorization - Create

Save for Later | Summary and Submit

Quick Start ...Populate From GO

*Business Purpose

*Event Name

*Default Location

*Date From *Date To

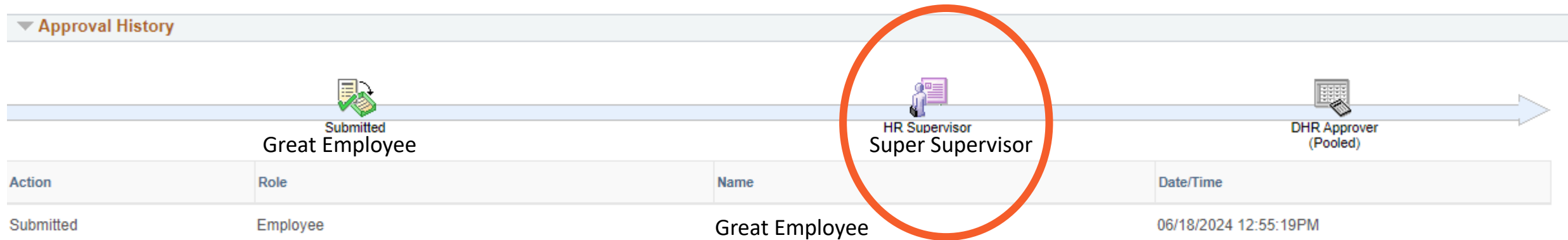
Pre Authorization # (if known)

Attachments

- Enter month and year of expected date to incur expense or complete the course before the description
 - Enter **AUG 25** for items to be purchased in August 2025, such as **AUG 25 Data Analytics book**.
 - Enter **May 26** for courses ending in May, such as **MAY 26 Data Analytics Course**.
- Enter **6/30/2026** as Date To
 - The future date bypasses “Date in the Past” error.
 - Coding in the background will automatically convert date to 6/30/2026.

DHR HR Supervisor

- After the employee submits the EA, the EA routes to the “HR Supervisor” (Supervisor listed in SF My Portal)



- If the HR Supervisor is incorrect, complete the following actions:
 - Reach out to your Departmental Personnel Officer to update the field in SF My Portal; and
 - Contact your Department Expense Manager to reassign the expense authorization to the correct person.

Potential EA Questions

- **How do I check the status?**
 - [How to View the Status of an Expense Authorization : Systems Support](#)
- **I have a specific question about my EA.**
 - Once the Tuition Reimbursement Portal reopens for FY25/26 requests, please submit your EA and DHR will review the request.
- **If the approved pre-authorization amount is less than the actual expense because of a discount, what happens to the balance?**
 - Unused balances will go back to the pool for any eligible employee to use.



Potential EA Questions Part Two

- **Can I cancel the approved EA if no longer needed?**
 - Yes, [Expenses: Cancel Travel Authorization : Systems Support](#)
- **If I cancel an EA request, does the balance go back to the employee's balance?**
 - Unused balances will go back to the pool for any eligible employee to use.
- **Can I get reimbursed for training costs incurred in July?**
 - You can submit an expense authorization request in August when the system reopens.



Potential EA Questions Part Three

- **What if I change unions?**
 - Please check your MOU to see if you are eligible for the Tuition Reimbursement program if your union changes.
- **Do I have to complete a course before I can request for pre-authorization approval?**
 - You may request an expense authorization before you begin the course. However, you must submit the request in the fiscal year the course ends. Example:

FY24/25		FY25/26	
May	June	July	August
Course Starts		Course Ends	Employee Submits EA for FY25/26 reimbursement



Potential EA Questions Part Four

- **Will a supervisor get a notification when I submit my expense authorization?**
 - Yes, the supervisor on your account will get a notification when an EA is submitted and needs to be approved. However, it is also advisable to inform your supervisor via email.
- **What are the required supporting documents?**
 - We will address later in the presentation.
- **My supervisor is away/on vacation and cannot approve my Expense Authorization.**
 - Reach out to your department accounting team to reassign the request to another manager.



Supporting Documentation

DHR Supporting Documentation

- Upload supporting documentation that displays:
 - Cost of Item (circle/highlight/underline, etc.)
 - Item Description
 - Each course requires itemized cost

Fall 2023 Classes

Course	Title	Class Number	Meeting and Location	Term	Fee	Refund Code
PM 9701 [01]	Project Planning & Management Overview Online	10440	Mon, 8/21/23 - 10/2/23 6:00 PM - 9:00 PM (Online)	Fall 2023	\$475	CEL 1
PM 9700 [01]	Project Scheduling Online	10442	Tue, 10/3/23 - 11/7/23 6:00 PM - 9:00 PM (Online)	Fall 2023	\$475	CEL 1



Supporting Documentation-Travel

- City officers and employees will only incur travel costs that are **reasonable and necessary**. To that end, **employees will use the least expensive mode of travel whenever and wherever possible**.
- Travel must occur **outside** the nine Bay Area Counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma).

Travel Expenses Annual Allowance

Employee Organization	Annual Allowance - Travel Cost
Local 21	Employees may utilize up to \$500 for up to one-half of the cost of necessary travel.
SEIU 1021 Citywide	Employees may utilize up to \$250 for up to 50% of the cost of necessary travel
SEIU 1021 Nurses	Employees may utilize up to \$500 for up to one-half of the cost of reasonable and necessary travel
Teamsters, Local 856, Supervising Registered Nurses	Employees may utilize up to one-half of the funds available to them for that fiscal year under this article to pay for up to one-half of the cost of reasonable and necessary travel.
Teamsters, Local 856 Multi-Unit	Employees may utilize up to \$750 for up to 50% of the cost of necessary travel



Hotel Option 1: Conference Hotel Rate

❑ Must stay at conference hotel at conference hotel rate

Join the California Academy of Audiology in Irvine for the CAA 25th Annual Conference!

Irvine, centrally located in the heart of Orange County, is a popular Southern California hub - 45 miles from Los Angeles, 85 from San Diego, and 15 minutes from Disneyland Resort. There's a lot to love right in Irvine from globally-inspired cuisine, eclectic entertainment venues, outdoor activities, and diverse shopping options.



Irvine Marriott

The CAA has secured a limited number of hotel rooms at a reduced rate for conference attendees. In order to receive the discounted conference rate, **all bookings should be made no later than Wednesday, August 21, 2024.**

The conference rate for a standard room is \$209.00 / night plus taxes.

Please note that the CAA has only reserved a limited number of rooms. Please reserve your room early to receive the discounted rate.

Attendees may book 2024 hotel room reservations as follows:

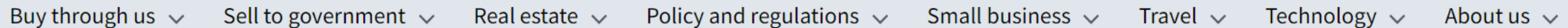
- [Book your group rate for California Academy of Audiology Annual Conference](#)
- Cancellations must be made 48 hours in advance of the day of arrival.



- Search by State and City
- Refer to conference month



Search GSA.gov

[illegible]

Supporting Documentation-Travel

Mileage

- Mileage to Los Angeles, San Diego, Las Vegas, and/or Seattle is reimbursable up to the price of an **air fare quote**
- Include an online map with number of miles between worksite/home and conference/ training location (For example, to Sacramento, CA or Monterey, CA)

Food is not an eligible expense

Supporting Documentation-Travel

☐ Bay Area Ride to Airport (CON Policy Section 4.7.2.6)

The Controller strongly recommends employees travel to/from regional airports using public transportation or shuttle to the extent possible. Employees should utilize the most reasonable and cost-effective mode of transportation. If using taxi, maximum reimbursement is \$100 each way, including tip.

☐ Transportation between an airport and a hotel/conference site is as follows

Recommended options are public transportation, shuttle, or taxi

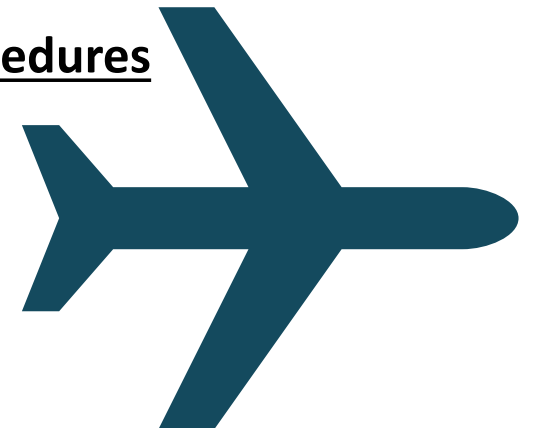
☐ Uber Cash Payment is NOT reimbursable



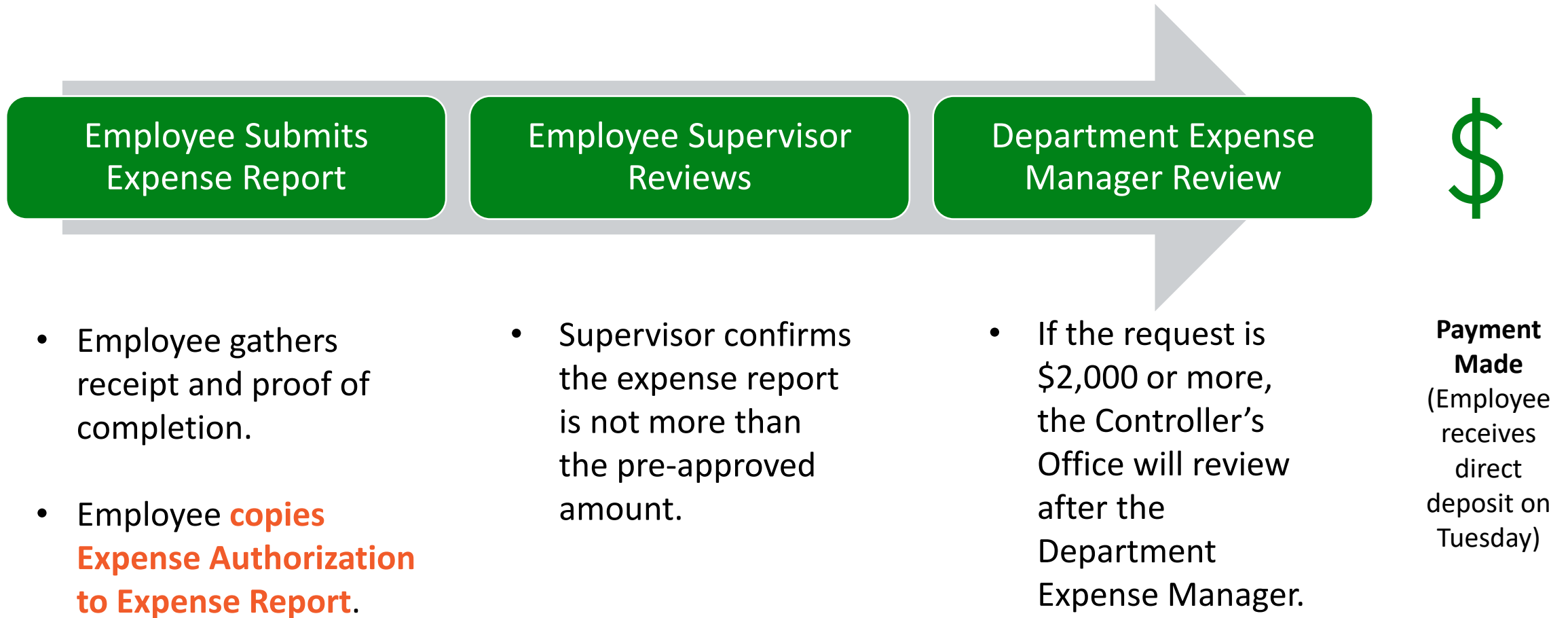
Supporting Documentation-Airfare

□ Airfare

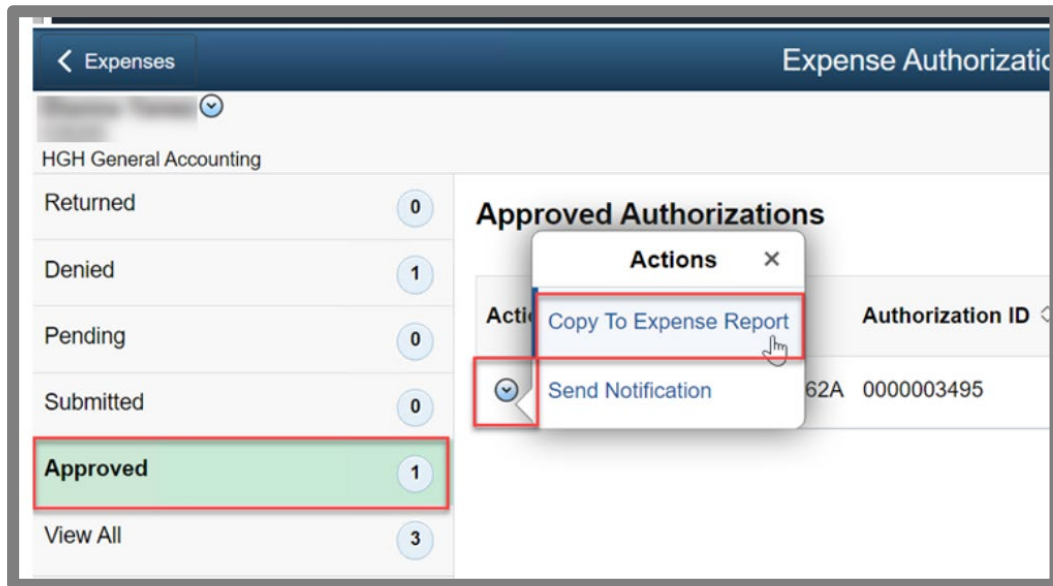
- One travel fare aggregator website (e.g., Expedia, Hotwire, Kayak, etc.) screenshot that includes at least one quote from San Francisco Bay Area direct to the conference/training location.
- Flight must be economy or coach class only.
- Upgrades are not reimbursable.
- Same day or near day tickets purchases are not reimbursable.
 - Near day defined by Controller's Office Accounting Policy and Procedures
- Travel insurance is not a reimbursable expense.
- Airline credits are not reimbursable
- Frequent flyer program miles program is not reimbursable



DHR Phase 2: Expense Report



DHR Reminders-Expense Reports



- It is critical for employees to use the “Copy to” function in creating an expense report, so all reviewers can access the expense authorization record.
- Employees cannot increase the requested expense report amount beyond the expense authorization approved amount.
- If not copied, **DHR will deny the request.**

Expense Report-Supporting Documentation

- Employees must upload all relevant supporting documentations to the actual Expense Report.
- Itemized receipt from the vendor with zero balance to demonstrate what was purchased.
 - Payments paid by gift card, airline credit, airline frequent flyer program miles program or Uber Cash are **NOT** reimbursable.
- Proof of successful completion (for courses and examinations) or proof of attendance for conferences.



Potential ER Questions

- **How do I submit for prorated reimbursement when only 90% of classes are completed?**
 - Please submit the expense authorization within the same fiscal year in which the course is completed.
- **My expense authorization was approved for 2 professional courses. I completed the first course in August and will complete the second course in December. How do I submit my expense report?**
 - Please submit the expense report in December, after both courses are completed.
 - **OR** submit one expense authorization per course, allowing you to submit separate expense reports as each course is completed.



Reminders and Common Questions

Reminders-Routing

- If the HR Supervisor is incorrect, complete the following actions:
 - Reach out to your Departmental Personnel Officer to update the field in SF My Portal; and
 - Contact your Department Expense Manager to reassign the expense authorization to the correct person.
 - Department contact list: [Microsoft Word - TR02-Department-Contacts 07.19.24 \(sfdhr.org\)](#)
- If the expense authorization was not routed to DHR as the final approver, it is NOT an approved request. If it is routed to the department instead, contact DHR at dhrrtuition-reimbursement@sfgov.org.



Common Questions Part Two

- **I cannot log into SF My Portal.**
 - Please submit a ticket at [Support : Systems Division Support \(sfgov.org\)](https://support.sfgov.org)
- **Are there any paper forms to sign?**
 - No, the request is approved electronically in SF My Portal.
- **I did not get reimbursed for an expense in FY2024/2025. Can I still submit a request?**
 - Check your MOU to see if you are eligible to resubmit a new EA using FY25/26 funds.



Common Questions Part Three

- **Is ____ eligible for reimbursement?**
 - Check your MOU [Labor agreements with the City and County of San Francisco | San Francisco \(sf.gov\)](#). If you are still unsure, submit an EA for DHR's review.
- **Am I eligible for tuition reimbursement?**
 - Please check your union MOU. If you are unsure about your eligibility for service hours, you can Request Expense Authorization within the portal. If you are not yet eligible for the Tuition Reimbursement program, you will receive an error message stating "You have not met the minimum time worked."
- **How long does it take for the EA to be approved?**
 - In general, DHR reviews tuition EAs within 2 weeks.



Common Questions Part Four

- **Do I need to submit the grades from my course to receive reimbursement?**
 - Proof of successful completion is required for reimbursement.
- **When will I get paid once I have submitted my Expense Report?**
 - Once your department expense manager (and Controller's Office if \$2,000 or more) approves it, it will be paid by direct deposit the following Tuesday.



Resources

- **How to Submit Expense Authorization**
 - [How to Request Pre-Approval for Tuition Expenses : Systems Support](#)
- **How to Copy Expense Authorization to Expense Report**
 - [How to create an Expense Report from an approved Expense Authorization : Systems Support](#)
- **How to View the Status of an Expense Authorization**
 - [How to View the Status of an Expense Authorization : Systems Support](#)



How-To Articles Continued

- **How to Modify a Returned Expense Authorization**
 - [How to Modify a Returned Expense Authorization : Systems Support](#)
- **How to Modify a Saved Expense Report**
 - [How to Modify a Saved Expense Report : Systems Support](#)
- **How to Approve a Tuition Expense Authorization**
 - [How to Approve a Tuition Expense Authorization Request : Systems Support](#)



Final Reminders and Next Steps

- Start gathering your supporting documentation and save in pdf format
- If you email DHR or Portal Support, please have your DSW ID and EA ID numbers ready

DHR System Opens

- Monday, August 4th

2025	AUGUST						2025
SUN	MON	TUE	WED	THU	FRI	SAT	
					1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24 31	25	26	27	28	29	30	

DHHR Questions and Answers

