



FY 2025-2026

MEA Tuition Reimbursement

Kick-Off Meeting

(2 meetings presenting same material)

- July 17th, 12:00 PM – 1:00 PM
- July 23rd, 11:00 AM – 12:00 PM



Topics of Discussion

- Introductions
- Eligibility
- Process Overview-Phase 1: Expense Authorization (EA)
- Supporting Documentation
- Process Overview-Phase2: Expense Report (ER)
- Resources & Trainings Available
- Questions and Answers

- Introductions
- This presentation is specifically for MEA represented job classes and does not cover department reimbursement processes
- Questions will be answered during questions and answers period at the end of the presentation

DHR Eligible Expenses



- The Tuition Reimbursement Program provides City employees with funds for professional development.
- <https://sfdhr.org/memoranda-understanding>
- [SFMTA Memorandums of Understanding \(MOUs\), Collective Bargaining Agreements \(CBAs\) and Labor Organizations / Unions | SFMTA](#)



Eligible Expenses Continued

- **What is the MEA reimbursement limit per year?**
 - Per the MEA-City MOU, until such funds are exhausted, an employee may utilize up to a maximum of \$2,000 per fiscal year for tuition, internal or external training programs, professional conferences, executive coaching, and professional licenses, certificates, and association memberships, professional software, and books and subscriptions.
 - Note:
 - \$2,000 is inclusive of training and equipment reimbursement
 - Up to \$1,000 may be used for equipment reimbursement
 - Examples:
 - Example 1: use \$2,000 for training **OR**
 - Example 2: use \$1,000 for equipment and \$1,000 for training
- **Food (including beverages) is not an eligible expense**

Who is Eligible and When

- **One-year continuous service in any classification represented by MEA and whose work schedule is 20 hours or more per week**
- **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 requests starting from the date the employee qualifies for tuition reimbursement
- **If an employee promoted to an MEA class and is not qualified yet, can they access the Local 21 funding?**
 - If the employee is in the MEA bargaining unit, the employee cannot submit a request to use Local 21 Employee Development Funds



Equipment



- Up to \$1,000 of the maximum funds available can be used for the purchase of personal electronic equipment
- [View Equipment Policy](#)
 - Types of devices
 - Number of devices
 - Processing
 - Priority of requests
- Equipment does not need to be returned to the City at the end of the fiscal year

Equipment Continued

INELIGIBLE EXPENSES

- Equipment purchased prior to MEA's approval
- Extended warranties
- Accidental Damage Replacement
- Accessories (Pencils, cases, keyboards)
- Apple Watches
- Kindle

Tips

- If equipment is more than \$1,000, take a screenshot of full amount. Employees can pay the difference out of pocket if the total exceeds the maximum allowable reimbursement
- Include estimated tax

DHREquipment Example

- If the requested equipment costs more than \$1,000, please enter \$1,000 in the tuition expense authorization.



iPhone 16 Pro Max 512GB White
Titanium


1 ▾

\$1,399.00

[Remove](#)

Carrier:


Connect with any carrier after you get your
new iPhone


 **Add AppleCare+ with Theft and Loss for iPhone 16 Pro Max for \$269.00**

[Add](#)

- Unlimited repairs for accidental damage protection
- Theft and loss coverage for up to two claims every 12 months
- Express Replacement Service — we'll ship you a replacement so you don't have to wait for a repair
- 24/7 priority access to Apple experts

[Learn more](#) ⓘ

 Order now. Pick up in-store:
Today at [Apple Union Square](#) ⓘ

 Order by 10:15 a.m. Delivers to [94103](#) ▾
Today from Store — \$9.00
Tomorrow — Free

Subtotal \$1,399.00

Shipping FREE

 Estimated tax for: [94103](#) ▾ \$120.66

Total \$1,519.66



Common Equipment Questions Part One

- What types of devices are eligible?
 - [View Equipment Policy](#)
- When are requests reviewed?
 - First time equipment requests are reviewed starting in September.
- How quickly do funds run out each year?
 - Equipment allocation is exhausted in the first two months after the system opens, however, the training fund tends not to be exhausted.



Common Equipment Questions Part Two

- Can I submit an equipment expense before the 1 year since funds are exhausted within 2 months and my 1 year is in October.
 - No, please submit the request in October after the minimum qualification has been met.
- If I'm getting pre-approval for an iPad, and a newer version of that same iPad comes out during the approval process, is that allowable?
 - Yes, you may purchase the newer version iPad after the expense authorization was approved. However, please note that the reimbursable amount cannot be greater than the pre-approved amount, and there is a 60-day deadline once you have been approved by MEA to make the purchase and submit the proof of payment documentation.



Process Overview

Phase 1: Pre-Authorization (Expense Authorization)

Employee Submits
Request

MEA Reviews

Phase 2: Expense Reimbursement (Expense Report)

Employee Submits
Expense Report

Employee Supervisor
Reviews

Department Expense
Manager Review

Pre-Authorization Approved
(Employee attends and
successfully completes course)

Payment Made
(Employee receives direct
deposit on Tuesday)



DHR Phase 1: Expense Authorization

Employee Submits Request

- Employee gathers supporting documentation for proposed eligible expense.
- Employee submits Expense Authorization.

MEA Reviews

- MEA will determine expense eligibility for MEA-represented employees.

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



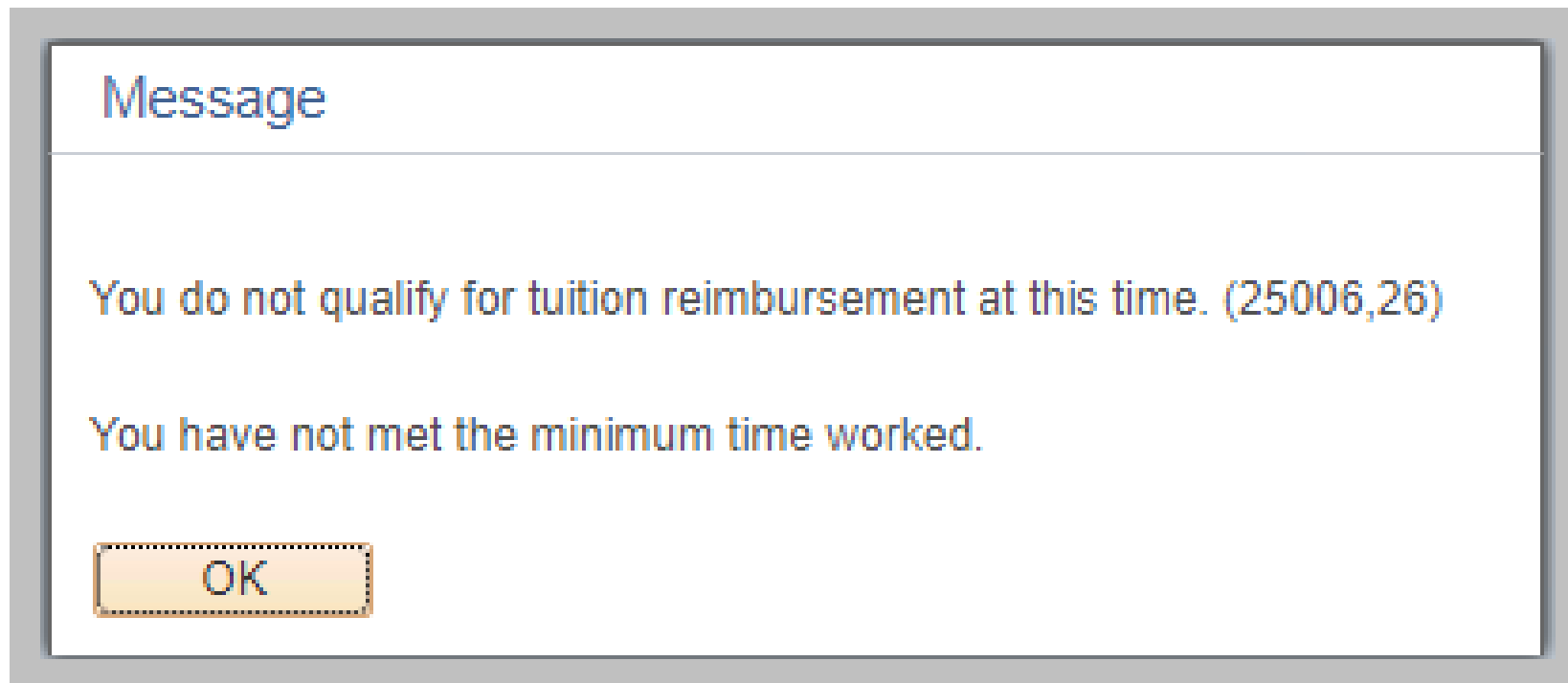
My Expenses



Create Expense
Authorization

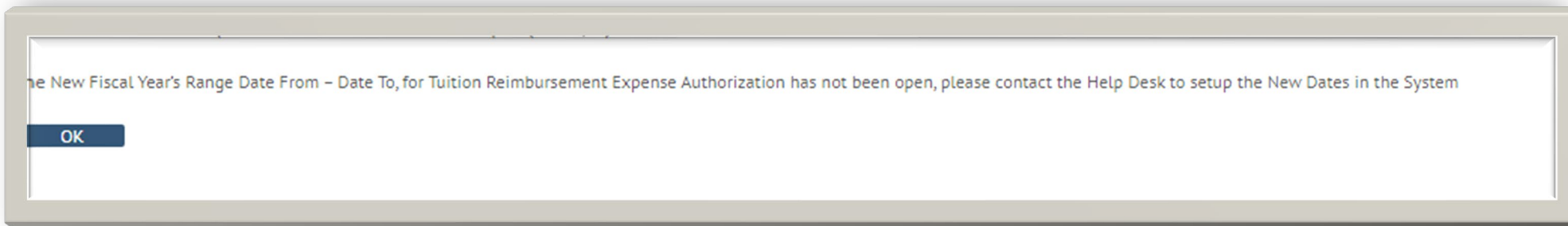
DHR Error Messages

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

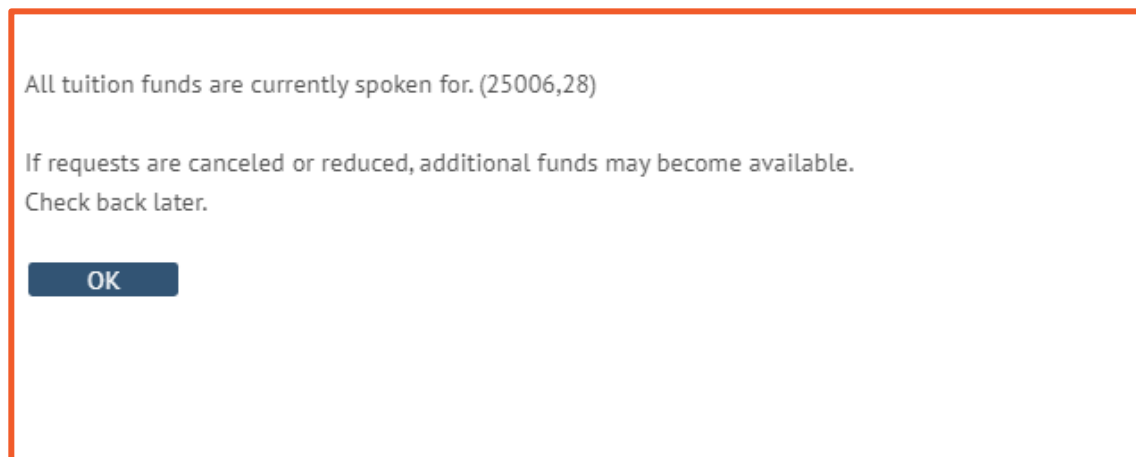


DHR System Messages

- System Not Open



- No Funds Available



DHR Mandatory Field

Expense Authorization - Create

[Save for Later](#) | [Summary and Submit](#)

Quick Start

*Business Purpose

*Event Name

*Default

Location

*Date From

*Date To

[Attachments](#)

Select **Tuition Reimbursement**

- The field triggers the correct workflow (to 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

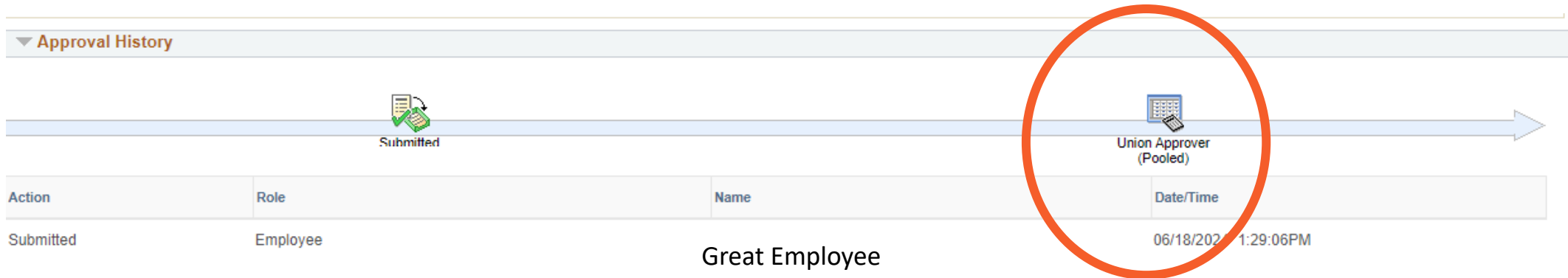
The screenshot shows the 'Expense Authorization - Create' form. At the top left is a black redacted box with a question mark icon. Below it, the '*Business Purpose' dropdown menu is set to 'Tuition Reimbursement'. The '*Event Name' text field contains 'May 26 Management Course' and is highlighted with a red rectangular box. An orange arrow points from this box down to the first bullet point of the instructions. To the right, the '*Default' location is 'CA, San Francisco'. Below that, the '*Date From' is '05/05/2026' and the '*Date To' is '06/30/2026'. The '*Date To' field is highlighted with a red rectangular box, and an orange arrow points from it down to the second bullet point of the instructions. Below the date fields is an 'Attachments' link with a paperclip icon.

- Enter month and year of expected date to incur expense or complete the course before the description.
- Examples:
 - Enter **AUG 25** for items to be purchased in August 2025, such as **AUG 25 Management book**.
 - Enter **May 26** for courses ending in May, such as **MAY 26 Management Course**

- Enter **06/30/2026**
 - The future date bypasses “Date in the Past” error.
 - Coding in the background will automatically convert date to 6/30/2026.

DHR Union Approver

- After the employee submits the EA, the EA routes to the “Union Approver” (MEA)



- If the request routes to your supervisor:
 - Delete the EA
 - Create a new EA and select “Tuition Reimbursement” as the business purpose

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 MEA 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?**
 - The system opens for EA requests in August.



Potential EA Questions Part Three

- **Can I submit for equipment, training and travel in the same FY?**
 - Yes, employees can submit EAs for equipment, training and travel in the same fiscal year provided the limits are met.
- **Can an employee request travel reimbursement for one conference, but use the pre-approval for another conference?**
 - No, Pre-approval for the conference/training is for the one submitted and there are no substitutions. The employee will need to cancel and re-submit for the intended conference/training.



Supporting Documentation

DHR Supporting Documentation

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

24 Plus Refresher

Review key concepts regarding effective coaching, supervision, and performance management. Enrollment is limited to leaders who have completed the 24 PLUS for Supervisors and Managers program. This training consists of 1 day. [More information.](#)

Date and Time	Cost	Link to Enroll
8/14/25 9:00 am - 5:00 pm In-Person	\$460	Enroll

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).

Hotel – 2 Options

1. Conference sponsored lodging rate (must stay at conference hotel) OR
2. Federal Per Diem rates available at <https://www.gsa.gov/travel/plan-book/per-diem-rates>

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 or beverage is not an eligible expense

☐ A \$50 per diem allowance may be submitted when traveling on approved training.

- Parking is reimbursed through the per diem allowance.
- Parking is reimbursable only as it relates to traveling outside the nine Bay Area counties.



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

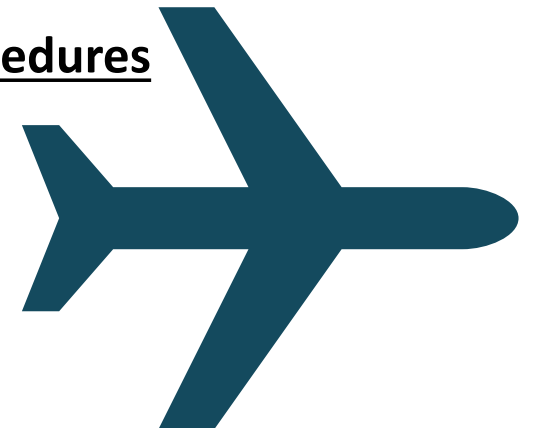
Recommended options are public transportation, shuttle, or taxi



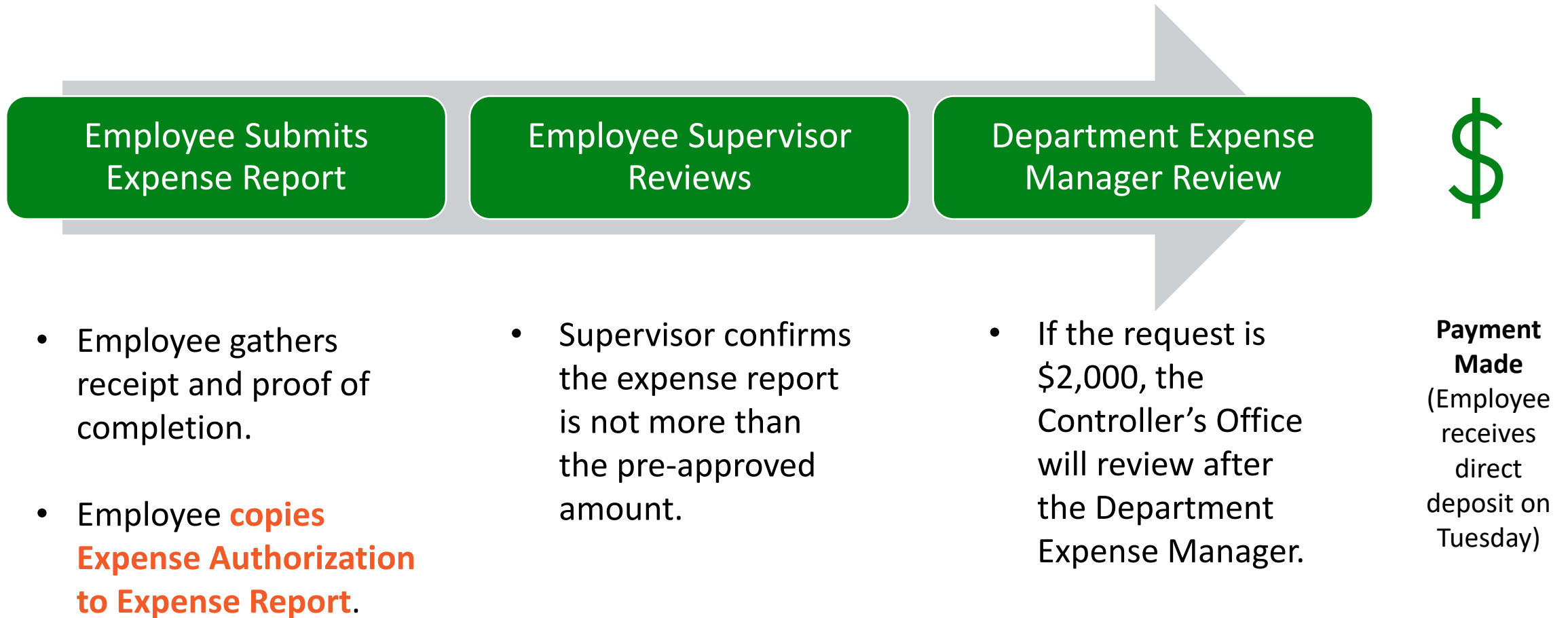
Supporting Documentation-Airfare

□ 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

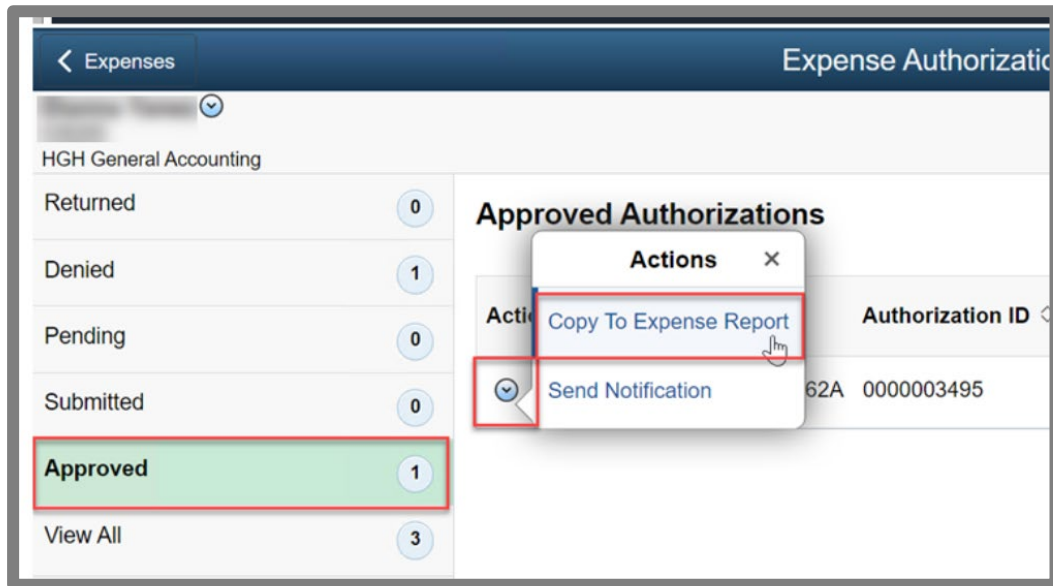


DHR Phase 2: Expense Report





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.



Common Questions Part One

- **When does the system open?**
 - August 4th, 2025
- **Are requests allowed prior to this date?**
 - The system is closed until the opening date.
- **What is eligible and when am I eligible to submit?**
 - Refer to [Labor agreements with the City and County of San Francisco | San Francisco \(sf.gov\)](#)
- **I cannot log into SF Employee Portal.**
 - Please submit a ticket at [Support : Systems Division Support \(sfgov.org\)](#)



Common Questions Part Two

- **Are there any paper forms to sign?**
 - No, the request is approved electronically in SF My Portal.
- **How can I get reimbursed for training costs incurred in July?**
 - Pre-approval is required for MEA Management Training Funds. Please contact MEA at staff@sfmea.com before incurring the training costs.
- **I did not get reimbursed for an expense in FY2024/2025. Can I still submit a request?**
 - All requests must be pre-approved by MEA.



Common Questions Part Three

- **Is _____ eligible for reimbursement?**
 - Check your MOU. If you are still unsure, submit an EA for MEA's review.
- **How much available balance do I or my union have?**
 - Please check your union balance by running the "Tuition Balance Report" in your *SF MY Portal – My Expenses – Tuition Balance Report*.
- **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) 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, MEA, or Portal Support, please have your DSW ID and EA ID numbers ready

- 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	



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

