City and County of San Francisco
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Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

FY24/25 General Tuition Reimbursement Kickoff Training Q&As

1. **What should we do if our listed supervisor is on leave? How do I reach out to my department accounting team or personnel officer?**
   Please contact your department expense manager to reassign your expense authorization or expense report to another available manager.
   The department contact list is available online:
   Department Personnel Officers: [Microsoft Word - TR02-Department-Contacts 07.26.24 (sfdhr.org)](#).
   Expense Mangers: [Expense Report Approval Reassignments - All Items (sharepoint.com)](#)

Employee Eligibility

2. **When will I become eligible for the tuition reimbursement program? Does the continuous one-year service requirement include short-term leave? Are TEX employees eligible for the tuition program? Does the one-year service requirement apply to seasonal employees?**
   Please check your MOU at: [Labor agreements with the City and County of San Francisco | San Francisco (sf.gov)](#) for eligibility requirements. SF Employee Portal automatically calculates employees' service hours. 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."

3. **I worked in multiple job classes in the last 6 years as a TEX employee under the same SEIU Local 1021 union, did I meet the 1 year of service?**
   Any employee who works at least 20 hours per week with a minimum of one (1) year continuous service in any classification represented by SEIU Local 1021 Citywide is eligible for tuition reimbursement.

4. **I will be eligible in January 2025, can I still submit the pre-approval earlier?**
   Unfortunately, employees cannot submit an expense authorization before they meet the minimum qualifications. Please submit your expense authorization in January 2025.

5. **Do I need to be in a union to be eligible for tuition reimbursements? Does an employee need to join union membership to be qualified for tuition reimbursement?**
   No, employee does not need to pay the union membership to be qualified for the tuition reimbursement program.

6. **Are interns in the 5380/81/82 class also eligible for tuition assistance after 1 year of continuous service?**
   Job classifications# 5380/81/82 are represented by union IFPTE, Local 21. Per Local 21 MOU, "An employee is eligible to seek Employee Development Fund reimbursement if the employee has regularly worked as a City employee for at least 20 hours per week for at least one (1) year of continuous service immediately prior to receipt of application."

7. **My MOU requires one year of service which I will meet in Sept 2024. I'm planning to take a Spring 2025 course that will start in Jan and end in May 2025. Do I submit the EA prior to the beginning of the course (when I first sign up for the course) or I have to submit expense authorization after the course ends?**
   Employees can submit an expense authorization before the course registration. Please submit an expense authorization in September 2024 after you met the minimum qualifications (service hours).

Eligible Expenses

8. **Is this reimbursement only for degree programs or also non-degree programs and coursework?**
   Courses related to the employee's current job classification are eligible for tuition reimbursement. Please refer to your MOU, some MOUs also allow courses that are related to classifications to which the employee might reasonably expect to be promoted.

9. **How far back can an employee request tuition reimbursement for?**
   Please refer to your union MOU. Employees can be reimbursed for tuition expenses incurred in the current fiscal year. However, some MOUs also allow employees to submit requests for tuition expenses incurred in the prior fiscal year.

10. **Does student loan deferments or forbearance due to public service count within the scope of tuition reimbursements?**
    Student loan deferments are typically not an eligible expense because the course expenses were incurred more than two fiscal years ago. See response to question #9.

Updated on 8/6/2024

11. **Can I backtrack and submit receipts for the course I paid for prior to my eligibility? Can I take a course before the waiting period?**

    No, employee can only submit expenses starting from the date the employee qualifies for tuition reimbursement.

12. **Can I request a desk or hardware supplies such as monitor, cell phone and tablet for remote work?**

    Desks and monitors are not eligible tuition expenses. Please refer to the Municipal Executives Association MOU and/or Unrepresented Employees Ordinance for cell phone and tablet equipment reimbursement language.

13. **Can I get reimbursed for license test fees like NCARB license tests, PE exam fees, exam preparation courses, exam preparation materials, or books?**

    Please refer to your union MOU. If you are still unsure of the expense eligibility, please submit an expense authorization when the system opens. DHR will review your request and determine the eligibility based on your MOU.

14. **What if I failed the course/certificate/exam?**

    Unfortunately, proof of successful completion is required for courses, certificates, examinations reimbursement.

15. **If I have a pre-approved expense authorization (EA) for a semester of 4 classes, but I did not complete one of the classes (I passed the other 3 classes), could I still receive pro-rated reimbursement? Please note that my EA is for the entire semester (all 4 classes). For example, if my tuition is $6,000 (pro-rating each class as $1,500 each), and EA is for $2,000, can I still be reimbursed the entire $2,000 if I did not complete one class since the other 3 classes are pro-rated as $4,500 together?**

    Yes, you can prorate the amount of completed courses. In this example, the cost of three completed courses is $4,500, which is greater than the pre-approved EA amount, you can be reimbursed for the full pre-approved $2,000. Please enter $2,000 in the expense report.

16. **Is an on-line certificate program through UC Berkeley Extension allowable?**

    Course registration may be an eligible expense. See response to question #13.

17. **Can I get reimbursement if I attend city college classes in Hayward/San Jose?**

    Course registration may be an eligible expense. See response to question #13.

18. **If attending a college such as Capella that charges a flat fee to complete as many classes as you can get through in a specific timeline, does that qualify for tuition reimbursement in Local 21 MOU?**

    The L21 MOU allows for $2,000 tuition reimbursement per fiscal year. Since this program charges a flat rate per term/semester rather than by unit, employees can submit a request for the term. Employees should also upload supporting documentation that lists the cost, name and descriptions of the proposed courses.

19. **Can this be an ongoing multiyear course like a master's program or has to be finished by the fiscal year?**

    Master's degree is not eligible for the tuition reimbursement program. However, employees can submit a request for the relevant courses in the master's program that end in the current fiscal year. Please note that some MOUs also allow courses that ended in the prior fiscal year, so please refer to your MOU.

20. **My graduate program requires me to pay for the 3-year program up-front. Can I be reimbursed per year? Or only the year I paid?**

    Please break down the program to courses, and then submit requests for eligible courses. Please refer to your MOU for course timing language. For example, per the Local 21 MOU, employees can request tuition expenses occurred in the current or prior fiscal year. If you are a Local 21 employee, you can submit a request for the courses that end in the current or prior fiscal year.

21. **I am interested in exam preparation courses that are taken "at your own pace" course where I can watch pre-recorded lessons, but the training website doesn't provide proof of course completion. How can I get reimbursed?**

    Please refer to your MOU. If the MOU allows reimbursement for relevant courses and books, proof of completion is not required for pre-recorded courses if the training organization does not provide such proof.

22. **Will the cost of an international conference be reimbursed?**

    Please refer to your MOU. If the MOU allows for professional conferences, then it includes national and international conferences. Employees should upload supporting documentation with amount converted to US dollars.

23. I need to attend some general courses to graduate. Are general courses eligible?
Please refer to your MOU. If the MOU only allows for tuition that is relevant to the current job classification, then general courses are not an eligible expense.

24. Can I get reimbursed for an education program that spans 12 months or more (and cover more than one fiscal year)?
See response to question #20.

25. I paid for a class which is required for my job on 7/2/24. Would that typically be approved?
Tuition reimbursement is intended for voluntary educational/training opportunities. Unless the MOU allows required trainings to be reimbursed with tuition reimbursement funds, the employees' departments should cover the costs of required trainings.

26. Can FY23/24 expense report still be approved for FY24/25 if supervisor did not approve passed FY23/24 deadline?
Any expense related documents in the system that were not approved by the close of business on June 27, 2024 were denied for FY23/24 closing. If your MOU allows expenses incurred in the prior fiscal year, please submit a new expense authorization in FY24/25 to be reimbursed with FY24/25 funds.

27. Can this cover student housing?
No, student housing is not an eligible expense.

28. 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.

29. Do I request tuition reimbursement only after successfully completing the course/certificate? If I am taking a course in January 2025, can I submit an expense authorization in August and submit the expense report in January?
Employees can submit an expense authorization before course starts/registration. After the expense authorization was approved and successfully completed the course, then employees can copy the pre-approved expense authorization to an expense report to trigger payment reimbursement process.

30. **Can I get reimbursement for the course that will cost more than my annual allowance? For example, I am a SEIU 1021 Citywide employee, and my annual allowance is $1,000, but the course/conference I am interested in costs more than $1,000.**

    If the requested course/conference costs more than the employee's available balance, employee should enter the remaining available amount in the expense authorization (EA). In this case, please enter $1,000 in the EA.

31. **Can I have more than one request for different tuition expenses?**

    Yes, you can submit one request for one eligible tuition expense.

32. **If I want to go to a conference in July 2024, but the registration deadline is in May 2024, how do I go about doing this, since it falls into two fiscal years?**

    Conferences or courses end in July 2024 are a FY24/25 expense, please submit an expense authorization in August when the system opens for FY24/25 requests.

    If you were an MEA (Municipal Executive Association) represented employee, please email MEA approver Christina Fong christina@sfmea.com and ask for an email approval before paying the registration fee.

33. **Can I purchase a relevant course today and then submit the pre-approval request on Aug 5? Or must the purchase date be after the pre-approval request is approved?**

    See response to question #32.

34. **My union's MOU does not specify that tuition reimbursement covers required supplies for computer classes like tablets or laptops. In your experience, does DHR typically consider these supplies eligible for reimbursement?**

    Unfortunately, if the hardware supplies were not listed in the MOU, it implies the hardware supplies are not eligible for tuition reimbursement.

35. **What are the criteria of whether the training/tuition/books are relevant to the employee's current classification? Is there someone I can ask before I register for a course?**

    Please submit your expense authorization when the system opens. DHR will review and process your request in accordance with the MOU. If you believe the expenses are relevant to your current classification but might raise concerns with the approver, please include a brief explanation outlining the relevance of the requested expenses.

36. **How about wages being paid while at a conference on days I would normally be at work. The MOU is undefined on this.**
    Unfortunately, wages while at a conference are not eligible for tuition reimbursement.

37. **Is there a cap on the tuition amount? What is the max amount we can get reimbursement?**
    Please check your union balance by running the "Tuition Balance Report" in SF Employee Portal Employee Links. Please note that the link is visible when users are on the City's network (i.e. at a work location on a work computer, or outside of work on VPN).

Travel Reimbursements:

Questions 38-50 are applicable to MOUs with tuition reimbursement travel language. Please check your MOU for your individual allowance limits. For example, Local 21 represented employees can be reimbursed for 50% of expenses up to $500 (of the individual's $2,000 allowance).

38. **What travel expenses can be reimbursed by the tuition reimbursement program.**
    If your MOU eligible for tuition travel reimbursement, then travel expenses (airfare, mileage, parking, transportation, lodging) that occur **outside** the nine Bay Area Counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma) are eligible travel expenses.

39. **What qualifies as a "conference hotel" - for a conference which advertises a map of many local hotels does that mean any of those hotels' rates are 'conference hotels'? And if so, what are the rules for reimbursement if there are a range of prices between the hotels?**
    Per the Controller's Office Accounting Policy and Procedures, "If a hotel is listed as recommended/overflow hotel but does not have a documented conference rate, reimbursement will be for actual expenses, with a maximum reimbursement up to the conference hotel rate only. If there are multiple conference hotels with a range of rates, the maximum reimbursement for the overflow hotel is up to the highest rate among the published conference hotels." Please upload a screenshot of the conference website with the list of recommended hotels in the expense authorization.

40. **The conference hotel rate is pre-approved, but it is higher than the GSM rate, would I be reimbursed for the pre-approved rate?**
    Conference hotel rates can be reimbursed if employees stay at the conference hotel.

41. If I attend a conference that is not at a hotel, am I able to shop for hotels via GSA rates?

Yes, employees can stay at a non-conference hotel. The maximum reimbursable non-conference hotel rate is up to the GSA federal per diem rate. The GSA federal per diem rate can be searched online: https://www.gsa.gov/travel/plan-book/per-diem-rates.

42. Is car rental reimbursement based on GSA per diem rates?

Per the Controller's Office Accounting Policy and Procedures, car rental requests must include why a rental car is the most economical and efficient/practical form of transportation. Car rental is limited to standard compact size, pre-paid fuel for re-filling the gas tank and automobile insurance are not reimbursable. The rental car amount, parking, and actual fuel costs are eligible expenses.

43. For travel reimbursement (driving), is that mileage or gas?

The tuition reimbursement reimburses driving cost by mileage at Federal mileage rate.

44. If an employee rents a car for travel, as car insurance is not reimbursable, what happens when there is a car accident? How will the cost of car accident be reimbursed?

Unfortunately, the cost of a car accident is not an eligible tuition reimbursement expense.

45. For conferences/training outside the 9 bay area counties, is there a policy regarding when you can fly to and from the conference? Also, which nights are covered? Can you fly in and stay the night before the conference? If the training or conference ends later in the day (at 5 or 6 pm), can you stay that night and fly the next morning?

Yes, employees can fly in and stay the night before the conference. Lodging expenses can include one day before or ending one day after the event.

46. If I want to upgrade your airline seat, can I pay the difference?

Seat upgrades are not eligible for tuition reimbursement. However, if the receipt itemizes the basic airfare cost separately from the upgrade expense, DHR can reimburse the cost of the basic airfare.

47. Are baggage fees reimbursable?

One checked bag is reimbursable.

48. For the estimated travel to and from the airport, can I provide a Google trip cost estimate via public transit, taxi or Uber or Lyft?

Yes, you can provide a Google trip cost estimate with the expense authorization.

49. Is travel to certain States (Chapter 12X) still restricted?

Chapter 12X was repealed. Employees may travel outside San Francisco for relevant conference or training opportunities.

50. Does food expense reimbursement fall under normal travel expense?

Food is not eligible for tuition reimbursement.

Supporting Documentations:

51. What supporting documentation is required for conferences?

For expense authorization (the pre-approval process), employees can upload supporting documentation that lists the name, date, description and cost of the conference.
For expense report (the payment process), the itemized receipt shows the payment of purchase, and proof of conference attendance are required.

52. If attending a conference, what kind of proof do you need that it was attended?

Proof an attendance is required for conference reimbursement. You may upload a copy of the Certificate, attendee badge, or a statement/email from the conference organizer that you attended the conference.

53. If an employee attended a pre-conference, or additional workshops (that requires a fee separate from the main conference fee), does the employee must provide proof of attendance for the main event and each additional conference event?

Employees should provide proof of attendance for each conference/event.

54. I'm on a waiting list for a class, do I need to know the exact cost (i.e. textbooks) to be able to submit for pre-approval or would an estimate work?

You may search for the textbook in the school library or other platforms such as Amazon. Then upload a screenshot that lists the name and cost of the textbook for your expense authorization.

55. Can I demonstrate proof of completion with a list of completed assignments?

Unfortunately, homework assignment progress is not sufficient as proof of successful course completion. The final grade is required for payment reimbursement.

Reimbursement Process:

56. **Is there a timeline when I must pay for a CEU course? When a course is offered in a few months (i.e. March 2025) can I wait until Jan 2025 to sign up and pay for the course? I don't want to have to pay too far in advance as courses are expensive.**
There is no timeline for when to pay for the eligible courses.

57. **Can we combine multiple courses in one EA?**
Yes, you can bundle courses in one expense authorization. However, DHR encourages submitting separate expense authorizations for each course, as proof of successful completion for each course is required for reimbursement. If you bundle all courses together, you will need to wait until all courses are completed to receive reimbursement.

58. **When submitting an EA do we need to update any Chartfield codes?**
Please do NOT update any Chartfield codes. The Chartfield codes are automatically populated after employee choses "Tuition Reimbursement" as the business purpose.

59. **What if the cost went up during the approval process?**
Please submit a new expense authorization for the additional costs and include the initial pre-approved expense authorization ID in the new expense authorization.

60. **What is the timeline for approval from start to finish?**
The approval time for the expense authorization depends on how quickly your HR supervisor and DHR approver review the expense authorization. In FY23/24, the average processing time for DHR was 4 days. However, during August, the high volume of submissions may cause delays.

61. **If my MOU lists permissible goods/items alongside tuition expenses, this is all submitted under tuition reimbursement?**
Please select "Tuition Reimbursement" as the business purpose when requesting reimbursement. For instance, if your MOU covers expenses such as books, professional memberships, or relevant but not required certificate under the tuition reimbursement section, these costs should be submitted under "Tuition Reimbursement."

62. **Do I enter the exact dates of conference in the from/to field in an expense authorization?**
Please enter 06/30/2025 in the "Date To" field to bypass the system date error.

63. What date do I enter if the course was in the past?

Peoplesoft will not allow a date in the past for expense authorization requests, please select 06/30/2025 in the "Date To" filed (even if you already completed your class).

64. If I have a pre-approved expense authorization, do I have until 6/30/2025 to submit and get reimbursement? If the bank of money allotted to SEIU nurses is used up by the time I submit an expense report for reimbursement, but I received pre-approval, am I guaranteed reimbursement?

The requested expense authorization amount is secured after the expense authorization is approved.

65. Can I submit a reimbursement form without payment? Is there a way to ensure you'll be reimbursed for a class you need to take in March 2025?

Please submit an expense authorization in August when the system opens for FY24/25 requests. A quote that lists the name and cost of the class is sufficient for expense authorization. The amount is secured after the expense authorization is approved. After successfully completing the course in March 2025, please copy the pre-approved expense authorization to an expense report to trigger the payment process.

66. If the Department is paying for part of the expense and DHR funds for part of the expense, do we still have to enter two EAs and two ERs?

Yes, please submit two requests to separate tuition reimbursement from department reimbursement.

67. If I was approved for Course A, can I switch to another Course B with the same expense authorization?

No, the course must be the same as the pre-approved course. If you are switching courses, please submit a new expense authorization for the new Course B, and then cancel the pre-approved expense authorization for the Course A that you no longer need.

68. When does the system close?

The system opens from August 5th, 2024 to June 30th, 2025 for FY24/25 tuition requests. Please note that the deadline might be earlier than June 30th due to the Controller's Office fiscal year-end policy. For instance, the system was closed on June 27, 2024, for FY23/24 requests.

Miscellaneous Questions:

69. What is the annual limit for reimbursement for Local 39 Stationary Engineers?
Please check your union balance by running the "Tuition Balance Report" in SF Employee Portal Employee Links. Please note that the link is visible when users are on the City's network (i.e. at a work location on a work computer, or outside of work on VPN).
Per the Local 39 Stationary Engineers MOU, "The City will contribute $8,000 annually to the Employee Tuition Reimbursement Program for the exclusive use of employees covered under this MOU. The maximum annual allocation for each covered employee shall be one thousand dollars ($1,000.00) per fiscal year for courses approved in accordance with guidelines established by the Department of Human Resources."

70. Does the tuition reimbursement eligible employee and the expense user's names have to match? Could you use someone else's eligibility if you have a good working relationship with them (i.e. a supervisor whom you aspire to work with after completion of a degree program)?
Employees can only submit expense authorizations for their own tuition reimbursement expenses.

71. Is there an obligation attached to the tuition approval (i.e. requirement to work with the City a certain amount of time after assistance received?)
Each MOU has different eligibility criteria. Please check your MOU.

72. How long does it take to update the supervisor on file in the system?
Please check with your department personnel officer.

73. How do we know who our HR supervisor is in the expense authorization?
Please follow the instructions to view the status of the expense authorization:
[How to View the Status of an Expense Authorization : Systems Division Support (sfgov.org)](). The name of the HR supervisor can be found in the approval history section.

74. Can I submit reimbursement for HR and Union reimbursement programs differently?
The tuition reimbursement program is funded by the City. Excluding the Municipal Executive Association, DHR reviews all tuition reimbursement expense authorizations.

75. What happens to the funds if employees do not use this benefit. Is it rolled over?
Employees' annual allowance will not carry over at the end of the fiscal year.

76. Does the vendor/training company have to be a City Supplier?

The vendor/training company needs to be a legitimate vendor/company.

77. Is there a limit of many years I submit application?

Employees can submit tuition reimbursement requests every fiscal year, as long as they meet the minimum qualifications specified in the MOU.

78. Is a manager prerogative to deny approval? Are there guidelines?

Yes, managers can deny a request. For example, if the requested license is mandatory, the manager should deny the request because required licenses are not eligible for tuition reimbursement.

79. Is there training available to teach supervisors how to do approvals?

A step-by-step instructions is available online: How to Approve a Tuition Expense Authorization Request : Systems Division Support (sfgov.org).

80. I submitted an expense authorization which I see approved in view all tab but cannot copy in expense report. Where do I reach out regarding expense report troubleshooting?

Please submit a ticket to the SF Employee Portal Support Team Support : Systems Division Support (sfgov.org) to troubleshoot the issue.

81. Does DHR have a list of resources for potential training opportunities?

Please explore training opportunities on DHR Classes And Training website: https://sfdhr.org/classes-and-training.