



**FY 2024-2025**

# MEA Tuition Reimbursement

Kick-Off Meeting

(2 meetings presenting same material)

- July 18<sup>th</sup>
- July 24<sup>th</sup>



# Topics of Discussion

- Introductions
- Eligibility
- Process Overview-Phase 1: Expense Authorization (EA)
- Supporting Documentation
- Process Overview-Phase 2: 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



# 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.
- **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 8/7/2024
  - Employee NOT eligible for course taken in June 2024
  - 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

## 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



# DHR Equipment Example

- If the requested equipment costs more than \$1000, please enter \$1000 in the tuition expense authorization.



iPhone 15 Pro Max 1TB Natural  
Titanium

1 ▾

\$1,599.00

[Remove](#)

**Carrier:**

Connect with any carrier after you get your  
new iPhone

Subtotal	\$1,599.00
Shipping	FREE
? Estimated tax for: 94103 ▾	\$137.91

**Total** **\$1,736.91**

[Get Daily Cash with Apple Card](#)



# 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)

Phase 2: Expense Reimbursement (Expense Report)



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

**Payment Made**  
(Employee receives direct deposit on Tuesday)





# 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 Employee Portal  
Employee Login



SF User Support  
SF Employee Portal

## Employee Links Tab

### WORK LINKS

#### HR INFORMATION

- How to Submit Vaccine Status
- Update/View Vaccine Status
- Report COVID Test Results
- Update Your Demographic Info

#### TIME REPORTING & ABSENCE

- Time Reporting
- Leave/Comptime Balances
- Time Approval Status

### EMPLOYEE LINKS

#### PAYROLL & COMPENSATION

- View Paycheck
- Compensation History
- W-4 Tax Information
- View or Print W-2/W-2c Forms
- W-2/W-2c Consent
- W-2 Reissue Request

#### eBENEFITS

- New Hire / Retiree Enrollment

### MANAGER LINKS

#### EXPENSE REQUESTS

- Request Expense Report
- Manage Expense Reports
- Expense Report History
- Manage Expense Delegations

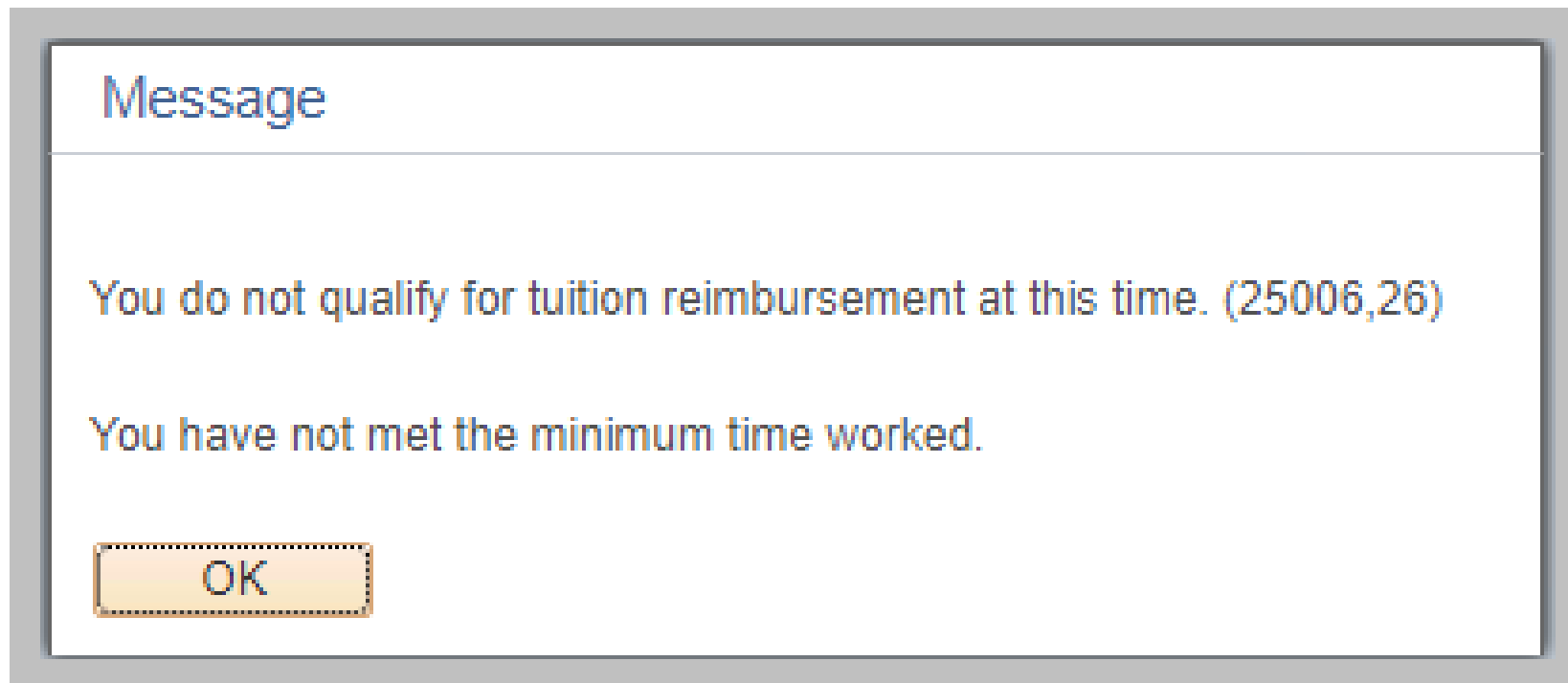
#### EXPENSE AUTHORIZATIONS

- How to Request an Expense Auth
- Request Expense Authorization**
- View Expense Authorization



# DHR Error Messages

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



# DHR Mandatory Field

\*Business Purpose

\*Event Name



## Select **Tuition Reimbursement**

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

\*Default Location

\*Date From

\*Date To

Pre Authorization # (if HRD 0953 known)

Attachments



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



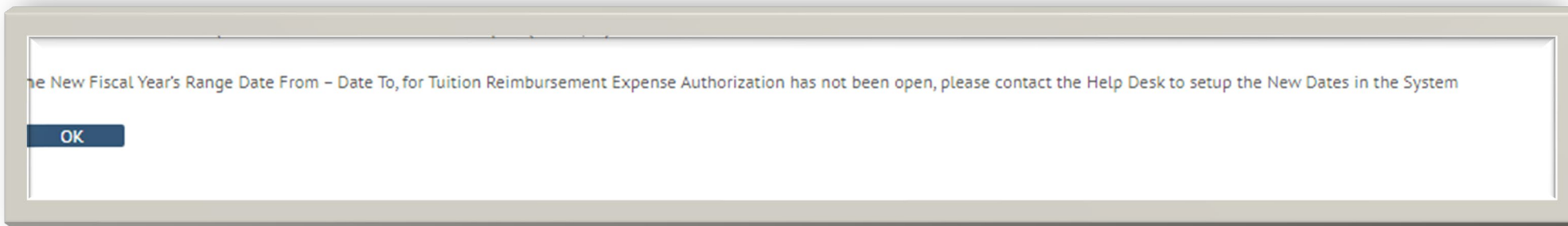


# Event Name and Date Fields

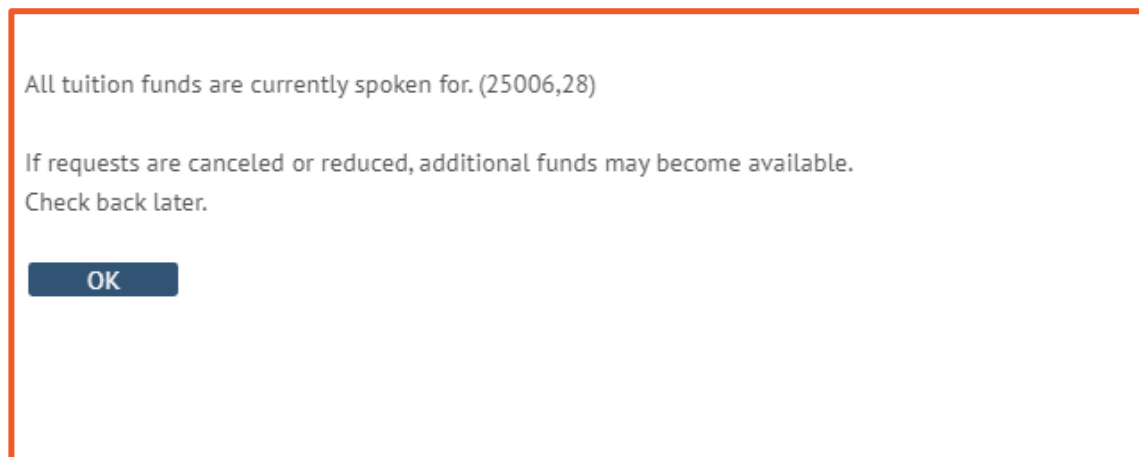
- Enter month and year of expected date to incur expense or complete the course before the description
  - Enter **AUG 24** for items to be purchased in August 2024
  - Enter **May 25** for courses ending in May
  - Examples: **MAY 25 Data Analytics Course**
  - **OCT 24 Equipment-Phone**

- Enter **6/30/2025**
  - The future date bypasses “Date in the Past” error.
  - Coding in the background will automatically convert date to 6/30/2025.

- System Not Open

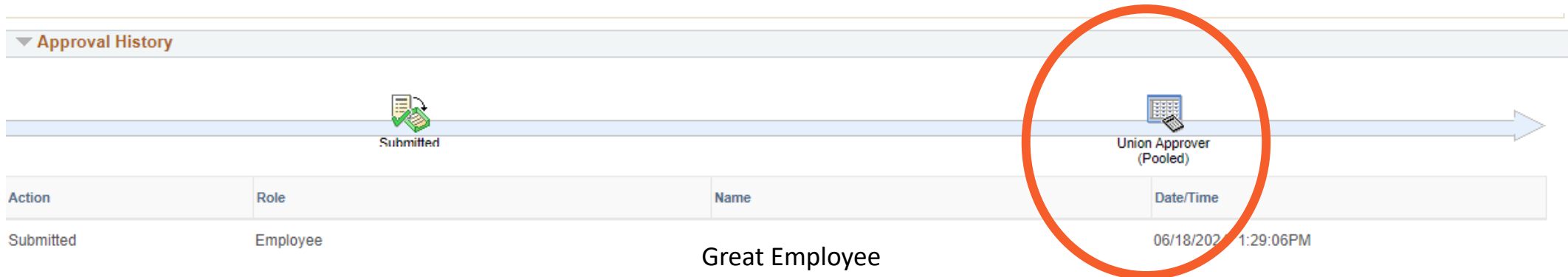


- No Funds Available



# 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 Division Support \(sfgov.org\)](https://www.sfgov.org/Support/Systems-Division/How-to-View-the-Status-of-an-Expense-Authorization)
- **I have a specific question about my EA.**
  - Once the Tuition Reimbursement Portal reopens for FY24/25 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 / Close Travel Authorization : Systems Division Support \(sfgov.org\)](https://www.sfgov.org/Expenses/Cancel/Close-Travel-Authorization-Systems-Division-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

## Fall 2023 Classes

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





# 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.**

## □ 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 is not an eligible expense

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



# 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

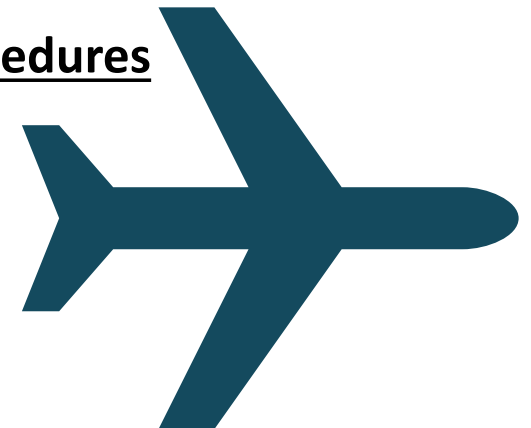
Recommended options are public transportation, shuttle, or taxi



# 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.



# DHR Phase 2: Expense Report

## Employee Submits Expense Report

- Employee gathers receipt and proof of completion.
- Employee **copies Expense Authorization to Expense Report.**

## Employee Supervisor Reviews

- Supervisor confirms the expense report is not more than the pre-approved amount.

## Department Expense Manager Review

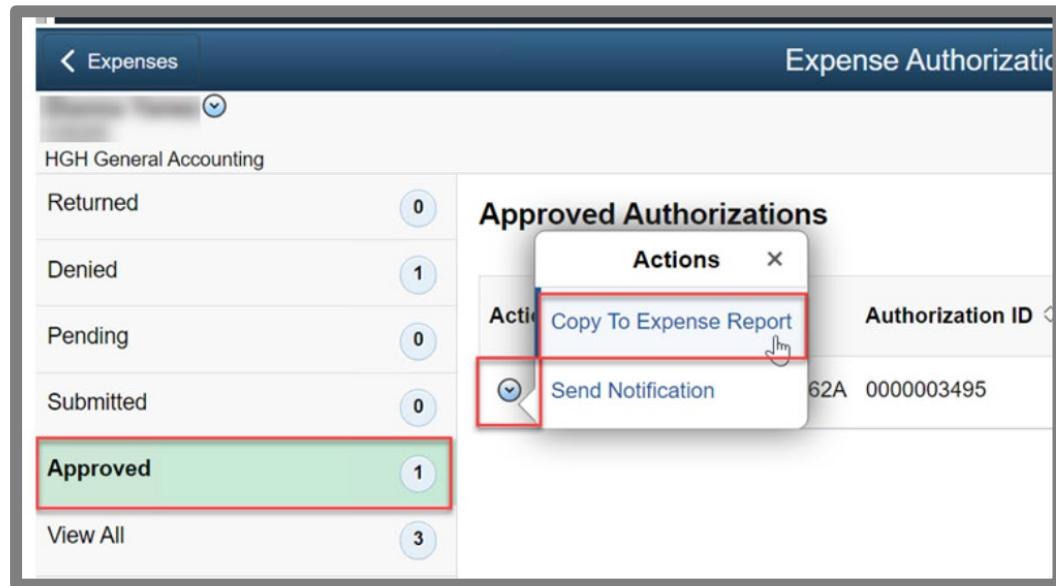
- If the request is \$2,000 or more, the Controller's Office will review after the Department Expense Manager.



**Payment Made**  
(Employee receives direct deposit on Tuesday)



# 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.**



# Common Questions Part One

- **When does the system open?**
  - August 5, 2024
- **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 Employee Portal.
- **How can I get reimbursed for training costs incurred in July?**
  - You can submit an expense authorization request in August when the system reopens.
- **I did not get reimbursed for an expense in FY2023/2024. 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 Employee Portal - Employee links.
- **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 Division Support \(sfgov.org\)](#)
- **How to Copy Expense Authorization to Expense Report**
  - [How to create an Expense Report from an approved Expense Authorization : Systems Division Support \(sfgov.org\)](#)
- **How to View the Status of an Expense Authorization**
  - [How to View the Status of an Expense Authorization : Systems Division Support \(sfgov.org\)](#)



# How-To Articles Continued

- **How to Modify a Returned Expense Authorization**
  - [How to Modify a Returned Expense Authorization : Systems Division Support \(sfgov.org\)](https://www.sfgov.org/finance/expense-authorization/returned-expense-authorization)
- **How to Modify a Saved Expense Report**
  - [How to Modify a Saved Expense Report : Systems Division Support \(sfgov.org\)](https://www.sfgov.org/finance/expense-authorization/saved-expense-report)
- **How to Approve a Tuition Expense Authorization**
  - [How to Approve a Tuition Expense Authorization Request : Systems Division Support \(sfgov.org\)](https://www.sfgov.org/finance/expense-authorization/tuition-expense-authorization)



# Final Reminders and Next Steps

- A copy of this presentation will be posted at [Online Tuition Reimbursement Process | Department of Human Resources \(sfdhr.org\)](https://www.sfdhr.org/online-tuition-reimbursement-process)
- A copy of the questions and answers will also be posted
- Start gathering your supporting documentation and save in pdf format
- If you email , MEA, DHR or Portal Support, please have your DSW ID and EA ID numbers ready

# DHR System Opens

- Monday, August 5<sup>th</sup>

2024	AUGUST						2024
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	
25	26	27	28	29	30	31	



# Questions and Answers

