



FY 2023-2024

Tuition Reimbursement

Kick-Off Meeting (1 of 4 Offerings)



Topics of Discussion

- Introductions
- What are Eligible Expenses
- Who is Eligible
- Process Overview
 - Phase 1: Expense Authorization
 - Phase 2: Expense Report
- Supporting Documentation
- Resources & Trainings Available



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
- <https://sfdhr.org/memoranda-understanding>



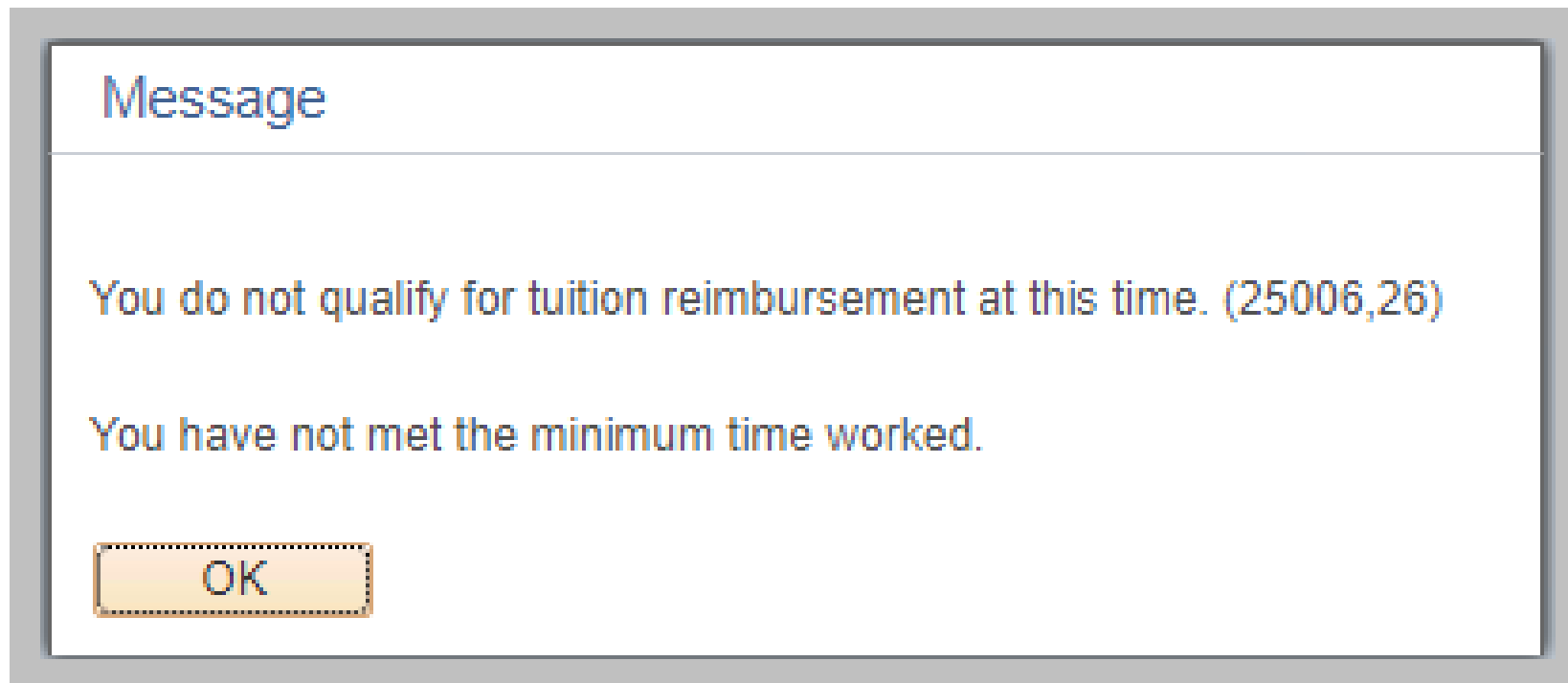
Who is Eligible (Example)

Employee Organization	Waiting Period Before Employee Can Submit Request*
Laborers, Local 261	1-year continuous service in any class
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
SEIU Miscellaneous	1-year continuous service in any classification represented by the Union
SEIU Nurses	1-year of continuous permanent service and whose regular work schedule is 0.4 or more FTE
Supervising Nurses	1-year continuous service in any class
Teamsters, Local 856 Multi-Unit	1-year continuous service in any class

**Waiting Period for FY2023/2024*

DHR Error Messages

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





Process Overview

Phase 1: Pre-Authorization (Expense Authorization)

Employee Submits Request

Employee Supervisor Reviews

DHR Tuition Team 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)





Phase 1: Expense Authorization

Employee Submits Request

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

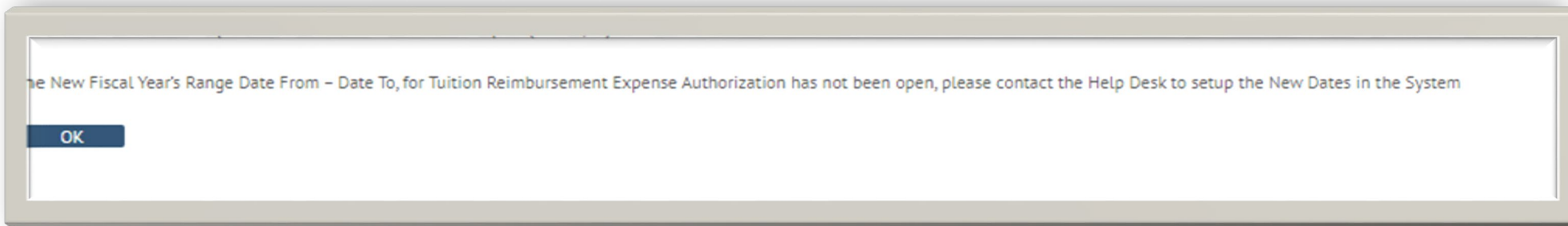
Employee Supervisor Reviews

- Supervisor ensures the request is relevant and not required by the department.

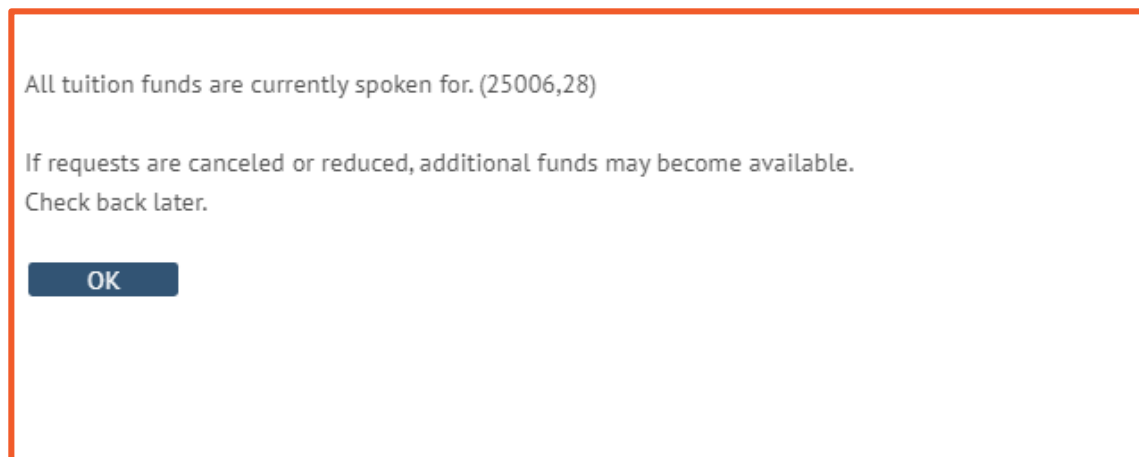
DHR Tuition Team Reviews

- DHR will determine if expense is eligible according to employee's MOU.
- MEA will determine expense eligibility for MEA-represented employees.

- System Not Open




- No Funds Available




Log into Employee Gateway



Citywide Enterprise Applications



SF Employee Portal
Employee Login



SF User Support
SF Employee Portal

Employee Links Tab

WORK LINKS	EMPLOYEE LINKS	MANAGER LINKS
HR INFORMATION <ul style="list-style-type: none">How to Submit Vaccine StatusUpdate/View Vaccine StatusReport COVID Test ResultsUpdate Your Demographic Info	PAYROLL & COMPENSATION <ul style="list-style-type: none">View PaycheckCompensation HistoryW-4 Tax InformationView or Print W-2/W-2c FormsW-2/W-2c ConsentW-2 Reissue Request eBENEFITS <ul style="list-style-type: none">New Hire / Retiree Enrollment	EXPENSE REQUESTS <ul style="list-style-type: none">Request Expense ReportManage Expense ReportsExpense Report HistoryManage Expense Delegations EXPENSE AUTHORIZATIONS <ul style="list-style-type: none">How to Request an Expense AuthRequest Expense AuthorizationView Expense Authorization

DHR Mandatory Fields

Expense Authorization - Create

Expense Authorization - Create

Save for Later | Summary and Submit

Christina Brusaca

Quick Start ...Populate From GO

*Business Purpose

*Event Name

*Default Location

*Date From *Date To

Pre Authorization # (if known)

Attachments

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.

Enter **Job class and Dept.**

Examples:

1823 PUC

2320 LHH

5201 DPW

2328 ZSFG

*Supporting Documentation Also Required

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

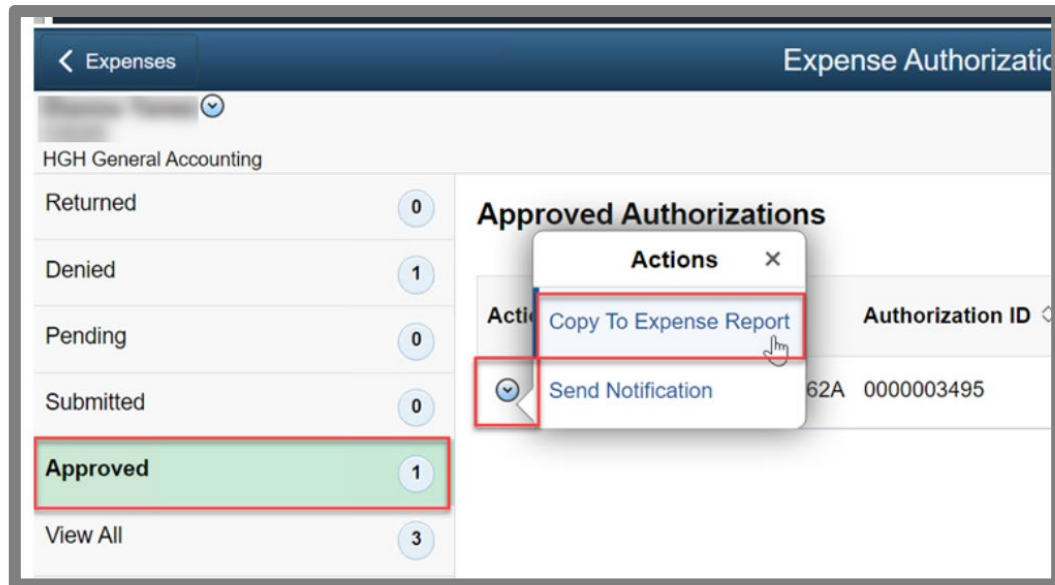
- If the request is \$2,000 or more, the Controller's Office will review after the Department Expense Manager.



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.



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

Hotel – 2 Options

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

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-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.
- Travel insurance is not a reimbursable expense.





Resources

Reminders-Routing

- If the HR Supervisor is incorrect, complete the following actions:
 - Reach out to your Departmental Personnel Officer to update the field in Peoplesoft; and
 - Contact your Department Expense Manager to reassign the expense authorization to the correct person.
- If the expense authorization was not routed to DHR or MEA as the final approver, it is NOT an approved request. If it is routed to the department instead, contact DHR at dhrtuitionreimbursement@sfgov.org.

- 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 \(sfgov.org\)](#)