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)

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

*Waiting Period for FY2023/2024*
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

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

Phase 2: Expense Reimbursement (Expense Report)
- Employee Submits Expense Report
- Employee Supervisor Reviews
- Department Expense Manager Review

Payment Made
(Employee receives direct deposit on Tuesday)
Phase 1: Expense Authorization

- Employee gathers supporting documentation for proposed eligible expense.
- Employee submits Expense Authorization.
  
  - Supervisor ensures the request is relevant and not required by the department.
  
  - DHR will determine if expense is eligible according to employee’s MOU.
  
  - MEA will determine expense eligibility for MEA-represented employees.
System Messages

• System Not Open

• No Funds Available

All tuition funds are currently spoken for (25006, 28).
If requests are canceled or reduced, additional funds may become available. Check back later.
Where to Go

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

<table>
<thead>
<tr>
<th>WORK LINKS</th>
<th>EMPLOYEE LINKS</th>
<th>MANAGER LINKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR INFORMATION</td>
<td>PAYROLL &amp; COMPENSATION</td>
<td>EXPENSE REQUESTS</td>
</tr>
<tr>
<td>How to Submit Vaccine Status</td>
<td>View Paycheck</td>
<td>Request Expense Report</td>
</tr>
<tr>
<td>Update/View Vaccine Status</td>
<td>Compensation History</td>
<td>Manage Expense Reports</td>
</tr>
<tr>
<td>Report COVID Test Results</td>
<td>W-4 Tax Information</td>
<td>Expense Report History</td>
</tr>
<tr>
<td>Update Your Demographic Info</td>
<td>View or Print W-2/W-2c Forms</td>
<td>Manage Expense Delegations</td>
</tr>
<tr>
<td>TIME REPORTING &amp; ABSENCE</td>
<td>W-2/W-2c Consent</td>
<td></td>
</tr>
<tr>
<td>Time Reporting</td>
<td>W-2 Reissue Request</td>
<td></td>
</tr>
<tr>
<td>Leave/Comptime Balances</td>
<td>eBENEFITS</td>
<td></td>
</tr>
<tr>
<td>Time Approval Status</td>
<td>New Hire / Retiree Enrollment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Request Expense Authorization</td>
<td>View Expense Authorization</td>
</tr>
</tbody>
</table>

DHR
Mandatory Fields

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*
Phase 2: Expense Report

- Employee gathers receipt and proof of completion.
- Employee copies Expense Authorization to Expense Report.
- Supervisor confirms the expense report is not more than the pre-approved amount.
- 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)
• 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
• Upload supporting documentation that displays:
  • Cost of Item (circle/highlight/underline, etc.)
  • Item Description
  • Each course requires itemized cost

### Fall 2023 Classes

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Class Number</th>
<th>Meeting and Location</th>
<th>Term</th>
<th>Fee</th>
<th>Refund Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM 9701 [01]</td>
<td>Project Planning &amp; Management Overview Online</td>
<td>10440</td>
<td>Mon, 8/21/23 - 10/2/23 6:00 PM - 9:00 PM (Online)</td>
<td>Fall 2023</td>
<td>$475</td>
<td>CEL 1</td>
</tr>
<tr>
<td>PM 9700 [01]</td>
<td>Project Scheduling Online</td>
<td>10442</td>
<td>Tue, 10/3/23 - 11/7/23 6:00 PM - 9:00 PM (Online)</td>
<td>Fall 2023</td>
<td>$475</td>
<td>CEL 1</td>
</tr>
</tbody>
</table>
Hotel – 2 Options

1. At conference sponsored lodging rate (must stay at) OR

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.
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 dhr-tuition-reimbursement@sfgov.org.
How-to Articles

• 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)