

Tuition Reimbursement Process Improvements

August 4, 2022

Virtual

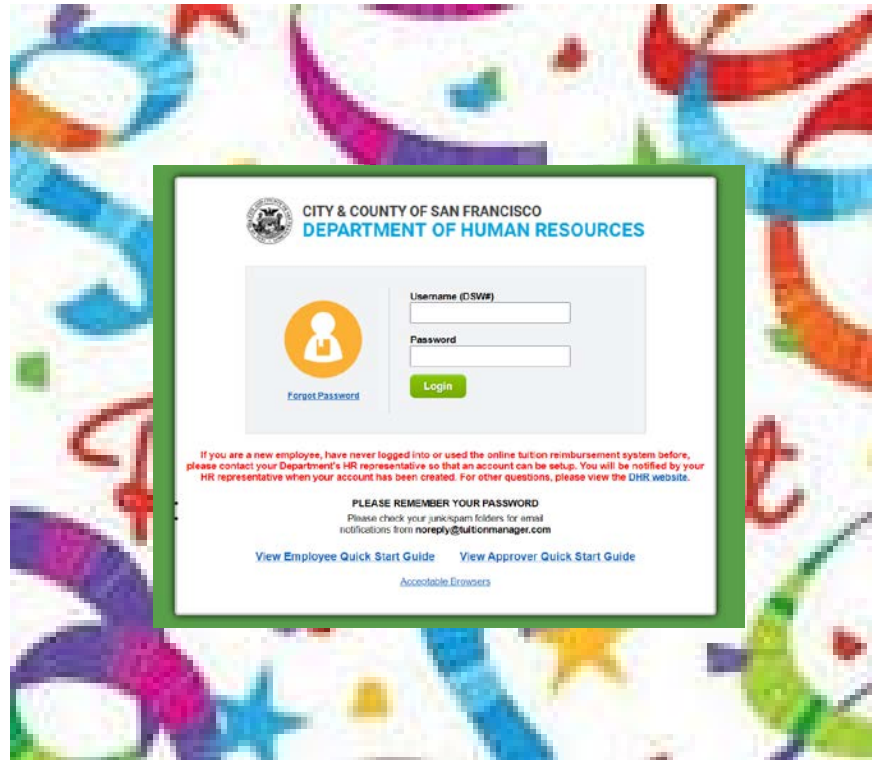




Agenda

- Tuition Reimbursement Eligibility
- Legacy System
- Benefits of New System
- Pre-Approval Requests Get a New Name
- HR Supervisor Responsibilities
- Approver Limitations
- Next Steps

- 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>





Peoplesoft/Employee Portal Benefits

- Pre-Approval Process in Peoplesoft/Employee Portal
- System Benefits
 - Single login for one system
 - Reduces redundant data entry
 - Centralized location for documentation
 - Eliminates paper forms!
 - Automatic account creation
 - Automatic profile updates
 - Pre-populated chartfields (account codes)!



Account Creation

- Employees NO longer need to request an account!
- Employees use their Employee Portal login credentials
- Expense Authorization is integrated with SF People & Pay, which leads to:
 - Real time job class updates;
 - Built-in eligibility criteria to verify one year of service (if applicable)
 - Programmed fund balance reporting; and
 - Pre-populated chartfields

Welcome to the SF Employee Gateway


Citywide Enterprise Applications

- SF Employee Portal**
Employee Login
- SF User Support**
SF Employee Portal

EMPLOYEE LINKS

- PAYROLL & COMPENSATION**
 - View Paycheck
 - Direct Deposit
 - 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
 - Open Enrollment
 - Submit a Qualifying Life Event
 - Continue your Enrollment
- EXPENSE REQUESTS**
 - Request Expense Reimbursement
 - Manage Expense Reimbursement
 - Expense Reimbursement History
 - Manage Expense Delegations
- EXPENSE AUTHORIZATIONS**
 - Request Expense Authorization
 - View Expense Authorization
 - Delete Expense Authorization
 - Cancel Expense Authorization

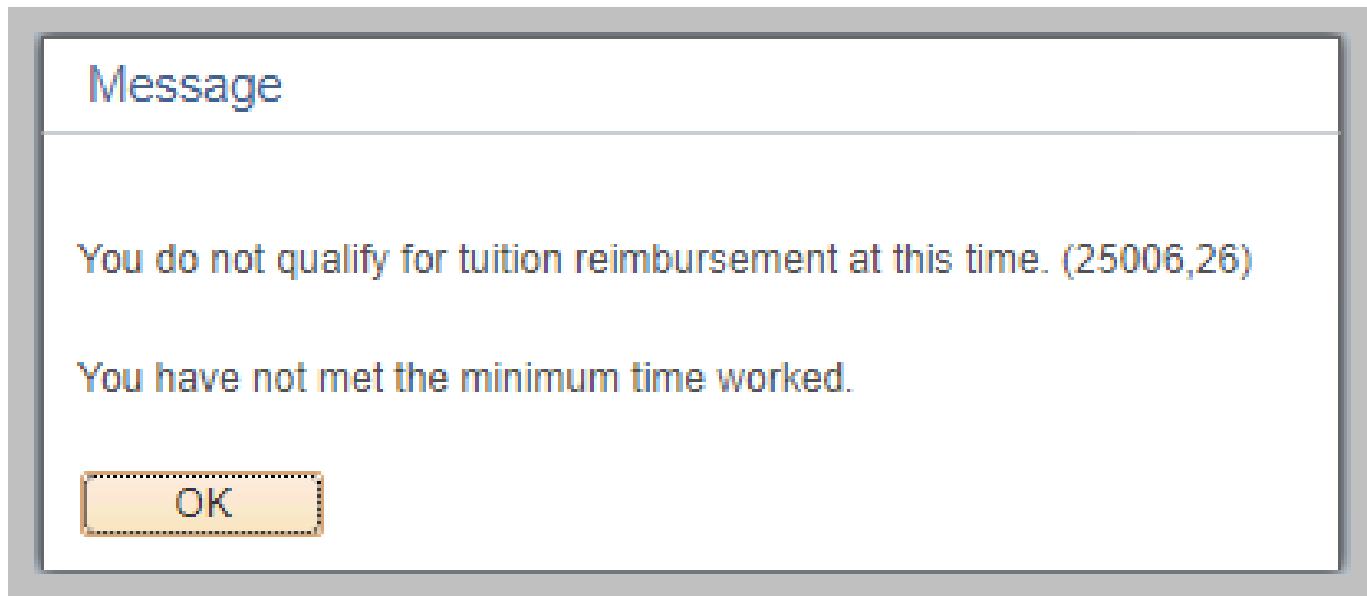
ALERTS 2 MY TO-DOS





Potential Error Message

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





Balance Report

Report Available on Portal

EXPENSE AUTHORIZATIONS

- Request Expense Authorization
- View Expense Authorization
- Delete Expense Authorization
- Cancel Expense Authorization
- Tuition Balance Report



Sample Report

Tuition Balance Report
Time run: 7/29/2022 2:35:08 PM

Fiscal Year: Jul 1, 2021 - Jun 30, 2022 ▼

My Information

My Name	Great Employee
Job	1053
Job Description	IS Business Analyst-Senior
Fiscal Year	Jul 1, 2021 - Jun 30, 2022
Employee Available Funds	\$48.00
Department	CON Citywide Systems
Union	Prof & Tech Eng, Local 21
Union Remaining Amount	\$198.00

My Expense Authorization Requests

Expense Authorization ID	Status	Description	Amount
000003402	TA Approved	test	\$225.00
000003405	TA Approved	test workflow	\$1.00
000003406	TA Approved	test	\$1.00
000003409	TA Approved	EA.UN.002	\$515.00
000003486	Submitted for Approval	Nursing Research N262A	\$575.00
000003487	TA Approved	Nursing Research N262A	\$575.00
000003494	Submitted for Approval	training	\$60.00
Grand Total			\$1,952.00



Expense Authorizations

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](#)

Projected Expenses [?](#)

Expand All | Collapse All Add: [Quick-Fill](#)

Totals (0 Lines) 0.00 USD

*Date	*Expense Type	Description	*Reimbursement Method	*Amount	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	USD

Expand All | Collapse All

Totals (0 Lines) 0.00 USD



Employee Reminders

- **Business Purpose:** **MUST** select *Tuition Reimbursement*

*Business Purpose

- **Location:** Helpful hint-enter state first

- For example, “CA, San”

*Default Location

Search by: begins with

[Advanced Lookup](#)

Search Results

View 100 First 1-18 of 18 Last

Description
CA, San Anselmo
CA, San Bernardino
CA, San Bruno
CA, San Carlos
CA, San Diego
CA, San Francisco
CA, San Jose
CA, San Leandro



Employee Reminders

- **Event Name:** short description

*Event Name

- **Pre-Authorization:** job class and department acronym

- 1823 PUC
- 2320 LHH
- 5201 DPW
- 1404 HSA
- 2328 ZSFG
- *Department codes listed on slide 25*

Pre Authorization # (if
known)



Employee Reminders

- Peoplesoft will not allow a date in the past, so **enter a date at least two weeks in the future** to provide enough time for review and approval (even if you already completed your class)
 - **In August 2022, please enter a date at least SIX weeks in the future**
 - For MEA equipment requests, enter a date of at least **10/15/2022**

- Upload supporting documentation that displays the cost of the item (circle/highlight/underline cost)
 - Sample estimate

learnit

Learning for organizations ▾ Classes ▾ Resources ▾ About ▾ Contact

REMOTE CLASS SIGN IN



Team Pass

Excel Intermediate

From \$145 - \$290

Mastery of Excel is developed in stages: first you learn basic formatting, functions and formulas, and build a few spreadsheets yourself. Easy enough. But moving to the next level of proficiency is hard! To create truly *professional-looking* spreadsheets, you'll need to know how to organize data into elegant, interactive tables that dynamically generate colorful charts and graphs. To bring you up to an intermediate-level usage of Excel, we'll train you in how to use these core features:

Who should attend

This class is for those who already use functions, formulas and cell references — but want to enhance their spreadsheets with responsive tables, advanced charts and pivot tables.

YOUR SELECTED CLASSES

Excel Intermediate - Full

Day

\$290 X

October 11, 2022

09:00 AM – 04:00 PM PDT

Cart total

\$290

GO TO CHECKOUT

Select number of seats/delegates in the next screen.

09:00 AM – 04:00 PM PDT



Employee Reminders

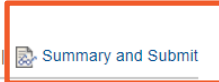
- Expense Type:
 - **Other Reimbursement.** 99% of expenses associated with this expense type
 - **Airfare.** Use this type for airfare only. Baggage would be listed with “Other reimbursement.”
 - **Equipment.** This type is available for Municipal Executives Association represented employees for hand-held electronic devices.



Summary and Submit

Expense Authorization - Create

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



Actions [...Choose an Action](#) [GO](#)

*Business Purpose

*Default Location

*Event Name

*Date From

*Date To Pre Authorization # (if known)

[Attachments](#)

Projected Expenses [?](#)

[Expand All](#) | [Collapse All](#) Add: [Quick-Fill](#)

Totals (1 Line) 0.00 USD

*Date	*Expense Type	*Description	*Reimbursement Method	*Amount	Currency	
<input type="text" value="05/19/2022"/>	<input type="text" value="L21 All Other Reimbursement"/>	<input type="text" value="Course Registration"/>	<input type="text" value="Direct Deposit"/>	<input type="text" value="5.00"/>	USD	+ -
Accounting Details ?						

[Expand All](#) | [Collapse All](#)

Totals (1 Line) 0.00 USD



Verify

Expense Authorization - Create

[Save for Later](#) | [Expense Authorization Details](#)

Actions ...Choose an Action GO

Business Purpose Tuition Reimbursement

*Default Location

*Event Name

*Date From *Date To

Pre Authorization # (if known)

Totals ?

View Printable Version

Notes

Attachments

Projected Expenses (1 Line) 5.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 5.00 USD

By checking this box, I certify these costs are reasonable estimates and comply with expense policy.



Submit

Expense Authorization - Create

[Save for Later](#) | [Expense Authorization Details](#)

Actions ...Choose an Action GO

Business Purpose Tuition Reimbursement

*Default Location CA, San Francisco

*Event Name Data Analysis Course Registrat

*Date From 05/19/2022 *Date To 05/19/2022

Pre Authorization # (if known) 1823 PUC

Totals ?

View Printable Version

Notes

Attachments

Projected Expenses (1 Line) 5.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 5.00 USD

By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

Submit Expense Authorization



Confirm Submittal

Expense Auth Submit Confirm



[Help](#)

Create Expense Authorization

Submit Confirmation

Totals 

Total Authorized Amount

5.00 USD

OK

Cancel



Submitted!

Expense Authorization

 [Expense Authorization Details](#)

Christina Brusaca

Actions ...Choose an Action

GO

Your expense authorization 0000003493 has been submitted for approval.

Business Purpose Tuition Reimbursement

Default Location CA, San Francisco

Authorization ID 0000003493 Submission in Process

Event Name Data Analysis Course Registrat

Date From 05/19/2022

Date To 05/19/2022

Pre Authorization # (if known) 1823 PUC

Totals ?

 View Printable Version

 Notes

Projected Expenses (1 Line) 5.00 USD

Denied Expenses 0.00 USD

Total Authorized Amount 5.00 USD

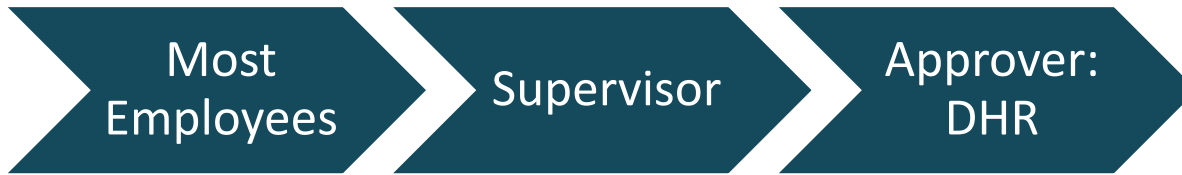
By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

Submit Expense Authorization

Refresh Approval Status

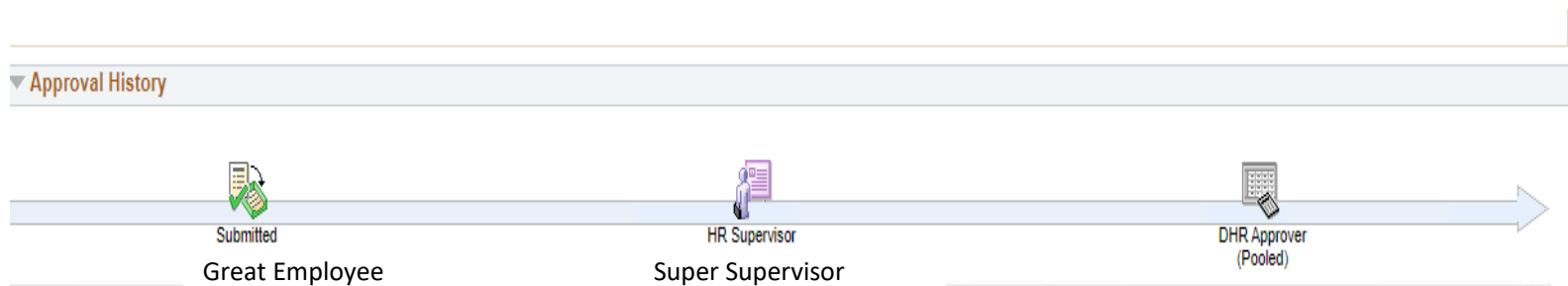


Workflow



The Expense Authorization review chain includes the following people:

1. **Employee**, who submits expense authorization
2. **Employee's Supervisor** (as listed in PeopleSoft), who approves expense authorization
3. **DHR**, who reviews and approves expense authorization





Sample Send Back Email

- If the request is missing information, the supervisor or final approver will send back the request to the employee's attention for updates. The system will send an email.

The screenshot shows an Outlook email window with the following content:

Subject: CCSF PSOFT - Expense Authorization request for 10.00 USD has been sent back for revision. - Message (Plain Text)

From: csfel11-prdas05-noreply@sfgov.org
Date: Fri 7/15/2022 8:14 AM

Subject: CCSF PSOFT - Expense Authorization request for 10.00 USD has been sent back for revision.

To: You replied to this message on 7/15/2022 8:32 AM.

The following expense authorization request has been sent back for revision:

Comment: Sending Back.
Employee ID: _____
Employee Name: _____
Submission Date: 2022-07-14
Expense Auth Description: Tuition Test
Expense Auth ID: 0000003488
Business Purpose: Training
Reimbursement Amount: 10.00 USD



HR Supervisor

- If the HR Supervisor is incorrect, complete the following actions.
 - Reach out to your Departmental Personnel Officer to update the field in Peoplesoft. See next slide for a list of contacts.
 - Contact your Department Expense Manager to reassign the expense authorization to the correct person.



Contacts to Update “Reports To” Field

DEPT	CONTACT
ADP	joron.coleman@sfgov.org
ADM	CityAdminHR@sfgov.org
AIR	Yvette.Gamble@flysfo.com; Iris.Goh@flysfo.com
ART	Heather.johnson@sfgov.org
ASR	Jonathan.nelly@sfgov.org
BOA	cynthia.goldstein@sfgov.org
BOS	jessica.j.wong@sfgov.org
CAT	Colleen.Dietterle@sfcityatty.org; Marylou.Remo@sfcityatty.org
CHF	Kate.Long@dcyf.org
CON	carlos.benitez@sfgov.org
CPC	michael.eng@sfgov.org
CSC	luz.morganti@sfgov.org
CSS	sfdcass-hr@sfgov.org

DEPT	CONTACT
DAT	SFDA-HRSupport@sfgov.org
DBI	Michele.nieve@sfgov.org
DEC	Nathaniel.cleveland@sfgov.org
DEM	sandy.chan@sfgov.org
DPA	benjamin.richey@sfgov.org
DPH	DPH-HRAdmin@sfdph.org
DPW	CityAdminHR@sfgov.org
ECN	anabel.simonelli@sfgov.org
ENV	Adam.Romoslawski@sfgov.org
ETH	sandra.aguayo@sfgov.org
FAM	mcaayabyab@famssf.org
FIR	jesusa.bushong@sfgov.org
HOM	melanie.laman@sfgov.org



Contacts to Update “Reports To” Field

DEPT	CONTACT
HSA	mildred.mendoza@sfgov.org
HSS	Rie.butler@sfgov.org
JUV	Joanna.luong@sfgov.org
LHH	DPH-HRAdmin@sfdph.org
LIB	Michael.Zhao@sfpl.org; Bonnie.Luu@sfpl.org; Yong.Lu@sfpl.org; Susan.Chu@sfpl.org
MTA	Yves.Valdez@sfmta.com
MYR	daniella.mattias@sfgov.org
PDR	arlene.laxamana@sfgov.org
POL	benjamin.houston@sfgov.org
PRT	annie.k.chan@sfport.com

DEPT	CONTACT
PUC	HRS@sfgov.org
REC	Pauline.Liang@sfgov.org
REG	Tish.mcnorton@sfgov.org
RET	grace.tam@sfgov.org
RNT	Kristin.hadley@sfgov.org
SHF	carla.clark@sfgov.org
TIS	CityAdminHR@sfgov.org
TTX	Gerald.buss@sfgov.org
WAR	jenna.lee@sfgov.org
WOM	Lauren.L.Taylor@sfgov.org
ZSFG	DPH-HRAdmin@sfdph.org



Supervisor Responsibilities

- Confirm expense is relevant
- Training required by the department is not eligible for tuition reimbursement
- If travel is applicable, verify state is not banned under Chapter 12X
 - <https://sf.gov/resource/2021/states-where-city-will-not-fund-travel-or-do-business>
- Expense Reports: Confirm Expense Report is not more than approved expense authorization

- Check the My To-Dos tab on the SF Employee Portal to see if your team has any expenses waiting for your approval!

The screenshot shows the SF Employee Portal interface. At the top, there are four main navigation tabs: 'MY LINKS', 'ALERTS', 'MY TEAM', and 'MY TO-DOS'. The 'MY TO-DOS' tab is selected and has a red notification badge with the number '1'. Below this, there are two sub-tabs: 'Time Approvals' (with a blue notification badge '1') and 'Expense Approvals' (with a red notification badge '2'). The 'Expense Approvals' sub-tab is active, showing a table of expense reports. The table has a header row with 'ITEM TYPE' and 'SENT BY'. Below the header, there is a row for 'Expense Report' with a red notification badge '3'. The table columns are 'Event Name', 'Business Purpose', 'Amount', and 'Submitted'. A 'Show Details' toggle is visible in the top right corner of the table area.

ITEM TYPE	SENT BY		
Expense Report	Employee Name		
Event Name	Business Purpose	Amount	Submitted



Approver Limitations

- **Approvers cannot modify expense totals.**
 - If there is an ineligible expense, the approver will return the expense authorization (EA) to employee to update amount total.
- **Approvers cannot approve EAs with a date in the past.**
 - If an employee submits an EA on Monday with a Tuesday event date and the approver views the request on Wednesday, the system will block approval. The approver will return the EA to the employee to update the date.



Department Representative Responsibilities

- Share information from DHR with department staff
- Encourage employees to utilize job aids to troubleshoot common issues
- Encourage employees to log into the system for status updates
- Triage employee concerns and elevate high-level issues to DHR for assistance
- List of department representatives available online at <https://sfdhr.org/online-tuition-reimbursement-process>



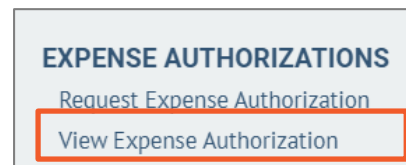
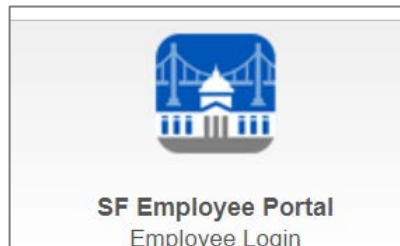
Next Step: Expense Report





Corresponding Expense Report

- Click View Expense Authorization
- Use the Copy function to copy the expense authorization information to an expense report!



The screenshot shows the 'Expenses' page with a navigation bar at the top. On the left, there is a list of authorization statuses: Returned (0), Denied (1), Pending (0), Submitted (0), **Approved (1)**, and View All (3). The 'Approved' status is highlighted in green. On the right, the 'Approved Authorizations' table is visible, with an 'Actions' dropdown menu open over it. The 'Copy To Expense Report' option is highlighted in a red box. Below it, the 'Send Notification' option is also visible. The table header includes 'Authorization ID' and 'Business'.

Status	Count
Returned	0
Denied	1
Pending	0
Submitted	0
Approved	1
View All	3

Actions	Authorization ID	Business
Copy To Expense Report	62A 0000003495	Tuition



Expense Report

- It is critical for employees to use the “Copy to” function, so all reviewers can access the expense authorization record
- Employees cannot increase the requested expense report amount beyond the expense authorization approved amount



Coming Soon!

- Job Aids coming soon!
- Expense Authorization (EA) Process starts Monday, August 8th

New Process Summary

Employee submits expense authorization and copies information into an expense report in PeopleSoft via SF Employee Portal



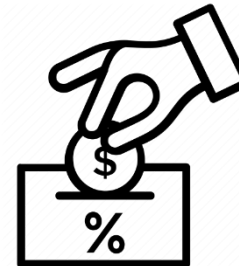
SF Employee Portal
Employee Login

EXPENSE AUTHORIZATIONS

[Request Expense Authorization](#)
[View Expense Authorization](#)



Reimbursement request is reviewed and approved if complete; employee receives direct deposit





Questions?