



**FY 2024-2025**

# Tuition Reimbursement Program

(4 meetings presenting same material)

- July 23<sup>rd</sup>, 9:30 a.m.
- July 24<sup>th</sup>, 1:30 p.m.
- July 29<sup>th</sup>, 2:00 p.m.
- July 30<sup>th</sup>, 10:30 a.m.



# Topics of Discussion

- Introductions
- Eligibility
- Process Overview-Phase 1: Expense Authorization (EA)
- Supporting Documentation
- Process Overview-Phase 2: Expense Report (ER)
- Reminders and Common Questions
- Resources Available
- Questions and Answers

- Introductions
- This presentation does not cover department reimbursement processes
- If you have a required license, check with your department first
  - SEIU Local 1021 Staff Nurses should check with DPH on reimbursement for Mandatory State of California Nursing Licenses
- Questions will be answered during questions and answers period at the end of the presentation



- 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) and When

Employee Organization	Waiting Period Before Employee Can Submit Request*
Laborers, Local 261	1-year continuous service in any class and whose work schedule is 20 hours or more per week
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 and whose work schedule is 20 hours or more per week
SEIU Miscellaneous	1-year continuous service in any classification represented by the Union and whose work schedule is 20 hours or more per week
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 and whose work schedule is 20 hours or more per week
Teamsters, Local 856 Multi-Unit	1-year continuous service in any class and whose work schedule is 20 hours or more per week

\*Waiting Period for FY2024/2025



- 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 expenses starting from the date the employee qualifies for tuition reimbursement



# 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 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.



## 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

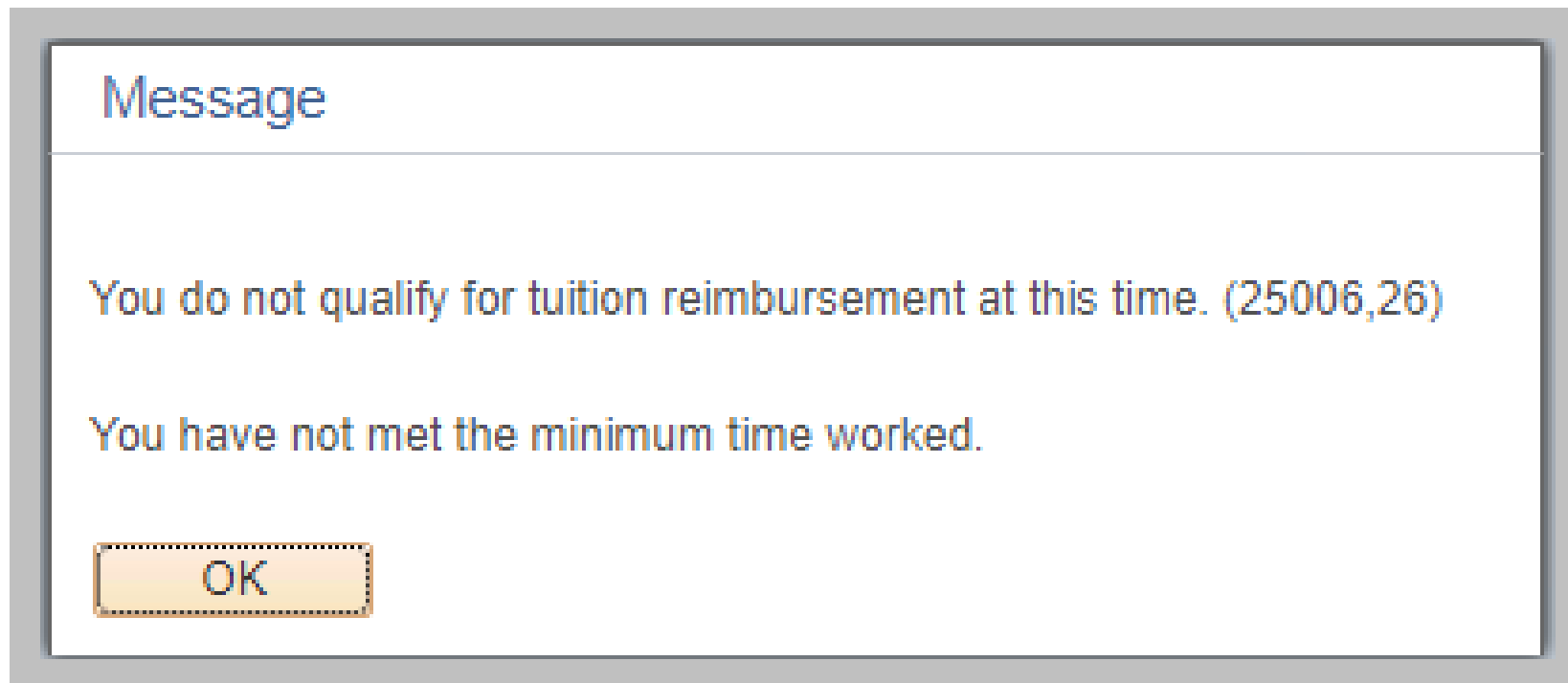
#### EXPENSE AUTHORIZATIONS

- 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

An orange box highlights the 'Business Purpose' dropdown menu, which is currently set to 'Tuition Reimbursement'. An orange arrow points from this box down towards the text 'Select Tuition Reimbursement'.

\*Default Location  🔍  
\*Date From  📅 \*Date To  📅  
Attachments   
Pre Authorization # (if HRD 1825 known)

An orange box highlights the 'Pre Authorization # (if HRD 1825 known)' field. An orange arrow points from this box down towards the text 'Once selected, the pre-authorization field will automatically populate the department and job class'.

## 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.

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



# Event Name and Date Fields

Expense Authorization - Create

Save for Later | Summary and Submit

Quick Start ...Populate From GO

\*Business Purpose

\*Event Name



\*Date From \*Date To

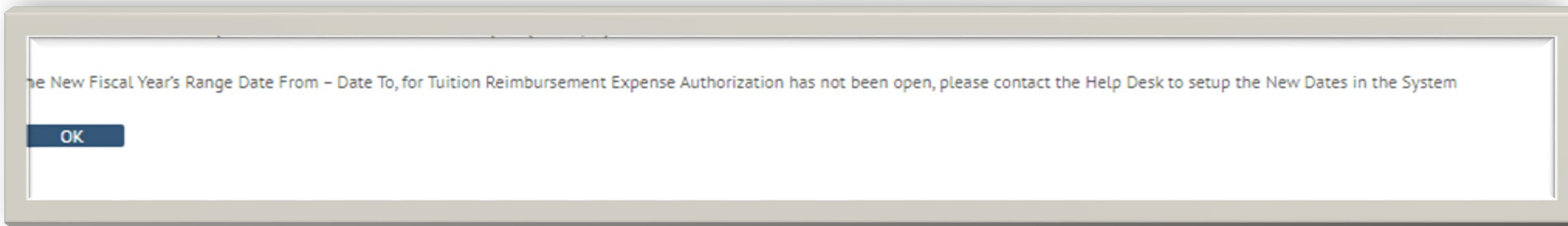
Attachments



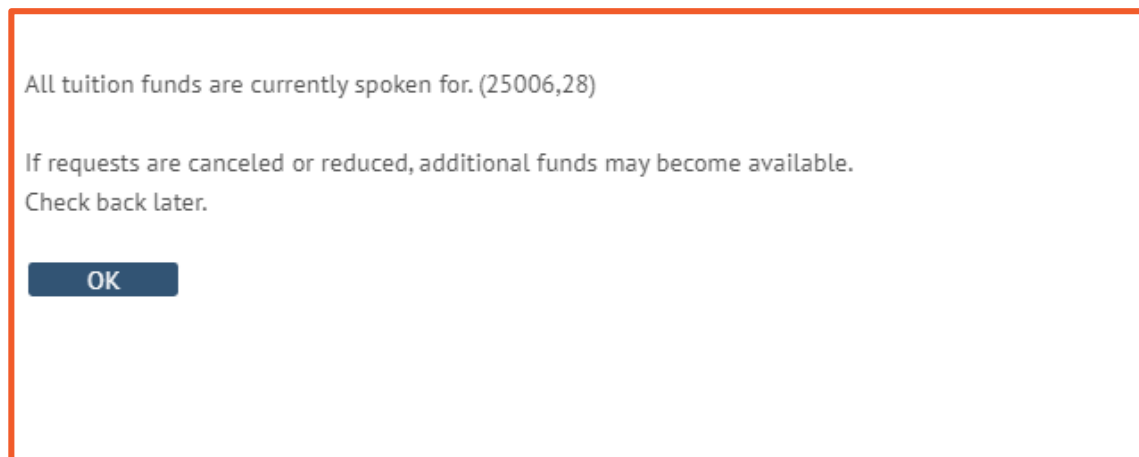
- Enter month and year of expected date to incur expense or complete the course before the description
  - Enter **AUG 24** for items to be purchased in August 2024
  - Enter **May 25** for courses ending in May
  - Example: **MAY 25 Data Analytics Course**

- 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

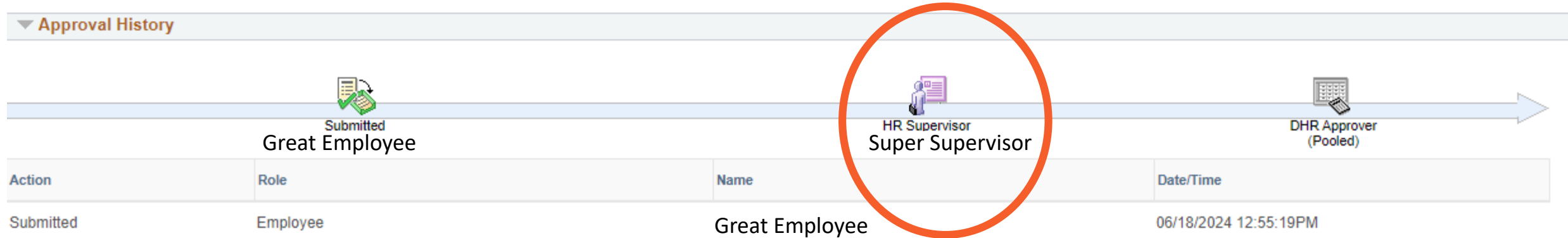


- No Funds Available



# DHR HR Supervisor

- After the employee submits the EA, the EA routes to the “HR Supervisor” (Supervisor listed in SF Employee Portal)



- If the HR Supervisor is incorrect, complete the following actions:
  - Reach out to your Departmental Personnel Officer to update the field in SF Employee Portal; and
  - Contact your Department Expense Manager to reassign the expense authorization to the correct person.

# 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 DHR 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 \(sfgov.org\)](#)
- **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?**
  - You can submit an expense authorization request in August when the system reopens.





# Potential EA Questions Part Three

- **What if I change unions?**
  - Please check your MOU to see if you are eligible for the Tuition Reimbursement program if your union changes.
- **Do I have to complete a course before I can request for pre-authorization approval?**
  - You may request an expense authorization before you begin the course. However, you must submit the request in the fiscal year the course ends. Example:

FY23/24		FY24/25	
May	June	July	August
Course Starts		Course Ends	Employee Submits EA for FY24/25 reimbursement



# Potential EA Questions Part Four

- **Will a supervisor get a notification when I submit my expense authorization?**
  - Yes, the supervisor on your account will get a notification when an EA is submitted and needs to be approved. However, it is also advisable to inform your supervisor via email.
- **What are the required supporting documents?**
  - We will address later in the presentation.
- **My supervisor is away/on vacation and cannot approve my Expense Authorization.**
  - Reach out to your department accounting team to reassign the request to another manager.



# 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**.
- Travel must occur **outside** the nine Bay Area Counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma).



# Hotel Option 1: Conference Hotel Rate

❑ Must stay at conference hotel at conference hotel rate

## Join the California Academy of Audiology in Irvine for the CAA 25th Annual Conference!

Irvine, centrally located in the heart of Orange County, is a popular Southern California hub - 45 miles from Los Angeles, 85 from San Diego, and 15 minutes from Disneyland Resort. There's a lot to love right in Irvine from globally-inspired cuisine, eclectic entertainment venues, outdoor activities, and diverse shopping options.



### Irvine Marriott

The CAA has secured a limited number of hotel rooms at a reduced rate for conference attendees. In order to receive the discounted conference rate, **all bookings should be made no later than Wednesday, August 21, 2024.**

The conference rate for a standard room is **\$209.00 / night plus taxes.**

Please note that the CAA has only reserved a limited number of rooms. Please reserve your room early to receive the discounted rate.

**Attendees may book 2024 hotel room reservations as follows:**

- [Book your group rate for California Academy of Audiology Annual Conference](#)
- Cancellations must be made 48 hours in advance of the day of arrival.





# 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





# 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

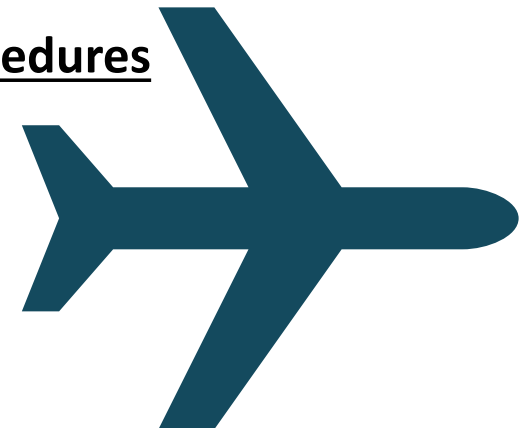
Recommended options are public transportation, shuttle, or taxi



# 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

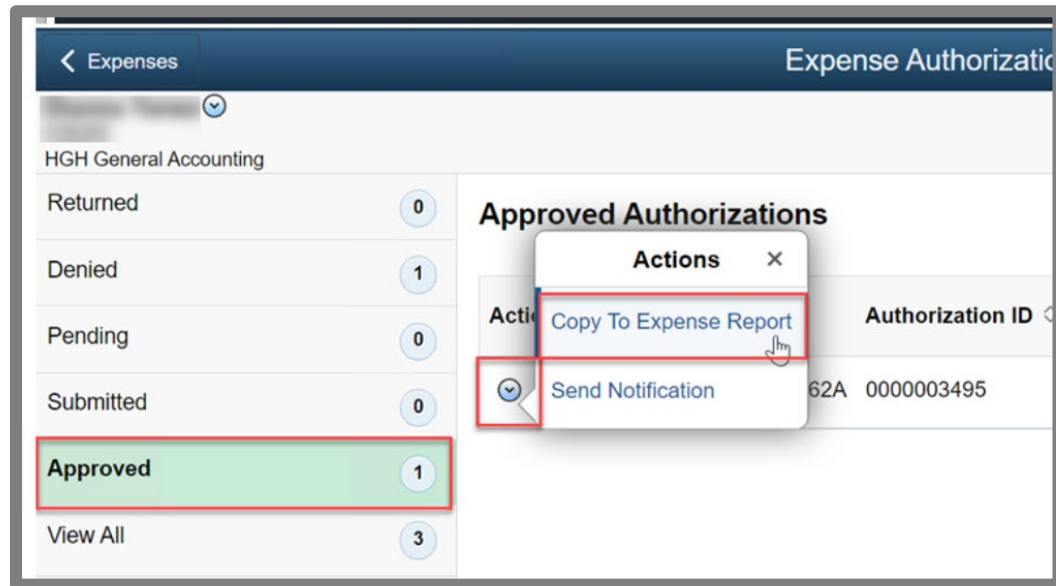
- If the request is \$2,000 or more, the Controller's Office will review after the Department Expense Manager.



**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.**

# Expense Report-Supporting Documentation

- Employees must upload all relevant supporting documentations to the actual Expense Report.
- Itemized receipt from the vendor with zero balance to demonstrate what was purchased.
- Proof of successful completion (for courses and examinations) or proof of attendance for conferences.



# Reminders and Common Questions

# Reminders-Routing

- If the HR Supervisor is incorrect, complete the following actions:
  - Reach out to your Departmental Personnel Officer to update the field in SF Employee Portal; and
  - Contact your Department Expense Manager to reassign the expense authorization to the correct person.
  - Department contact list: [Microsoft Word - TR02-Department-Contacts 07.19.24 \(sfdhr.org\)](#)
- 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](mailto:dhr-tuition-reimbursement@sfgov.org).



# 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?**
  - Check your MOU to see if you are eligible to resubmit a new EA using FY24/25 funds.



# Common Questions Part Three

- **Is \_\_\_\_\_ eligible for reimbursement?**
  - Check your MOU. If you are still unsure, submit an EA for DHR's review.
- **How long does it take for the EA to be approved?**
  - DHR's FY23/24 average was 4 days
- **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. 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).



## Common Questions Part Four

- **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/Systems-Division-Support/How-to-Modify-a-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/Systems-Division-Support/How-to-Modify-a-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/Systems-Division-Support/How-to-Approve-a-Tuition-Expense-Authorization-Request)



# 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 be posted
- Start gathering your supporting documentation and save in pdf format
- If you email DHR or SF Employee Portal Support Team, 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

