



Tuition-Related Expense Authorization

Updated August 2, 2024

1 GATHER SUPPORTING DOCUMENTS

Include item price and circle/highlight/underline the event date and item price.

- a. Each MOU has different criteria for who and what is eligible. Review your [MOU](#) and the proposed eligible expenses.
- b. If your request includes travel, please include the applicable documents:
 - i. **Hotel:** The conference sponsored lodging rate or Federal Per Diem rate.
 - ii. **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.
 - iii. **Mileage:** An online map with number of miles between worksite/home and conference/training location (For example, to Sacramento, CA or Monterey, CA). Please note that mileage to Los Angeles, San Diego, Las Vegas and/or Seattle is reimbursable up to the price of an air fare quote.

2 REQUEST PRE-APPROVAL ONLINE

Login to [Employee Portal](#) and click on “Request Expense Authorization”

Guideline:

- a. Select “Tuition Reimbursement” from the Business Purpose drop down menu.
- b. Event Name field: Enter month and year of expected date to incur expense or complete the course before the description

Example:

- i. Enter AUG 24 Data Analytic Book for data analytics book to be purchased in August 2024
- ii. Enter MAY 25 Data Analytics Course for data analytic courses ending in May 2025

3 RECEIVE APPROVAL

The expense authorization will route to your supervisor (excluding employees represented by Municipal Executives Association) to confirm the expense is relevant and not required by the department. The final approver will be DHR or Municipal Executives Association.

4 GATHER EXPENSE DOCUMENTATION

- a. Itemized receipt from the vendor with zero balance to demonstrate what was purchased.
- b. Proof of attendance/successful completion. If the employee attended a pre-conference, or additional workshops (that requires a fee separate from the main conference fee), the employee must provide proof of attendance for the main event and each additional conference event.

5 COPY TO EXPENSE REPORT

The fiscal year ends on June 30th. Please submit the expense report by June 11th to ensure there is enough time for everyone in the approval path to review and approve the expense report.

- a. Login to Employee Portal and click on “View Expense Authorization.” Click on the “Approved” button. Click on the drop-down arrow to select “Copy to Expense Report”