



Tuition-Related Expense Authorization

Updated August 2022

1 GATHER SUPPORTING DOCUMENTS

- Include item price and circle/highlight/underline the event date and item price.
- Each MOU has different criteria for who and what is eligible. Review your [MOU](#) and the proposed eligible expenses.
 - Does your request include travel outside CA? Verify the state on the [Chapter 12X Banned State list web page](#).
 - If your request includes travel, please include the applicable documents:
 - Hotel:** The conference sponsored lodging rate or Federal Per Diem rate.
 - Airfare:** One travel fare aggregator website (e.g., Expedia, Hotwire, Kayak, etc.) screenshot that includes at least three quotes 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.
 - 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:

- Select “Tuition Reimbursement” from the Business Purpose drop down menu.
 - Enter a short description in the Event Name field.
 - Enter your job class, department acronym in the Pre-Authorization # field (such as: 2320 DPH, 5201 DPW, 1822 PUC, 1404 HSA).
 - 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).

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

- Itemized receipt
- Proof of payment
- 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 15th to ensure there is enough time for everyone in the approval path to review and approve the expense report.

- 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”