

2023-2024 MEA MTA Management Training Fund Guidelines

Guidelines are applicable for MTA requests that are processed through the PeopleSoft's SF Employee Portal (previously Tuition Reimbursement System)

1. Training Reimbursement Fund 2023-2024 Allocation: **\$48,000**
2. Of the \$48,000 allocated for Training, **\$24,000** will be allocated for Equipment Reimbursements for 2023-2024
3. **Training and Equipment requests require pre-approval**, i.e. the Expense Authorization request must be approved by MEA **before** the expense has been incurred or the expenditure will not be reimbursed through the MEA MTA Training and Equipment Fund;
 - Login to the PeopleSoft's SF Employee Portal system to request pre-approval for your expense authorizations <https://sfgov.org/sfc/employee-gateway>.
 - If you are a new user, please contact your **department representative** to get an account.
4. **July 2023 will be a blackout period on equipment and training requests** to allow MEA and the City to close books on FY 2022-2023 – this has been the past practice;
5. **We will notify MEA members as soon as we know the date that PeopleSoft's SF Employee Portal Tuition Reimbursement System will begin accepting requests for the 202-2024 fiscal year.**
6. The last day to submit training requests in the online system is the last business day in June 2024, or the point at which the fund has been exhausted.
7. **Starting in September**, first time participants in the Equipment Program will be processed. MEA will then process member requests for equipment not previously purchased (e.g. phone if prior purchase was laptop). Thereafter, MEA will process member requests for replacement equipment assuming funds are still available. Finally, requests for equipment previously purchased and reimbursed through the Program prior to July 1, 2022 will be processed assuming funds are still available. **PLEASE NOTE:** Laptops and Tablets are considered the same type of equipment, i.e. laptop = tablet.
8. The SF Employee Portal Tuition Reimbursement system sends email notifications regarding **ANY** change in the "status" of a request (e.g. approvals, rejections, clarification, information and requests for documentation). Therefore, it is important that all participating employees update their online account with a current email address.
9. Once your request has been approved and the expense had been incurred, please proceed to PeopleSoft's SF Employee Portal for the next steps to complete an expense report in the reimbursement process.

10. Per the MOU, employees may utilize up to \$1,000 of the funds available to them for that fiscal year under this article to pay for the cost of reasonable and necessary travel and lodging for approved training. Travel reimbursement rates shall be as specified in the Controller's travel policy memo; however, a \$50 per diem allowance may be submitted when traveling on approved training.