



Municipal Transportation Agency
City and County of San Francisco

TUITION REIMBURSEMENT REQUEST

PERSONAL INFORMATION

Name (Please PRINT) Social Security No. Date of Request
Home Address City, State, Zip Code Daytime Phone #
Department/Program Date of PCS Appt. (Mo/Yr) Evening Phone # (Optional)
Job Class No. & Title:

Employee Organization & Bargaining Unit: (Please check one)

- Local 1414 - Auto Machinist
Local 6 - Electrical Workers
Local 200
Local 250A - Transit Operator
Local 250A (7410/9132)
SEIU Service Critical Employees

EDUCATIONAL INFORMATION

Course Title/ Workshop (Attach Registration Form & Flyers) Date(s) of Course/Workshop
Educational Institution Tuition/Fees
Employee's Signature Date
Supervisor's Signature Date

I have read and understand the tuition reimbursement conditions.

FOR MTA, HR USE ONLY: File #: Amount Approved:

Request Approved: Denied: Dept. Personnel Officer/Appointing Officer Signature Date

(If denied, indicate reason)

FINANCE APPROVAL: Doc #:

Date:



TUITION REIMBURSEMENT ELIGIBILITY REQUIREMENTS AND INSTRUCTIONS

Eligibility for reimbursement is governed by the provisions of the Memoranda of Understanding (MOU) between the San Francisco Municipal Transportation Agency (MTA) and the employee's respective bargaining unit. Employees in said classifications may not receive more than the amount stated in the MOU per fiscal year from this special allocation.

Eligibility:

- 1) Any regularly scheduled full-time or part-time employee within the City services;
- 2) Who has served a minimum of one (1) year of continuous service in any class immediately prior to receipt of application may apply for tuition reimbursement;
- 3) Reimbursement shall be for training courses pertaining to the duties of a higher classification or for purpose of improving performance in the present classification; and
- 4) Courses are offered by an accredited educational institution.
- 5) **Reimbursement shall be subject to successful completion of the course. MUNI will attempt to make such payment promptly upon the employee's submission of proof of satisfactory completion with a passing grade.**

MUNI will reimburse each eligible employee the specified amount as indicated in employee's respective MOU for tuition, books, supplies and other fees for such course, upon successful completion of the course.

Instructions PRIOR to course start date:

- 1) Complete the Personal Information and Educational Information sections of the form on reverse side. Attach a copy of the course registration form and flyers, which contains the following information: Title of the course/workshop, dates of course and fees.
- 2) Sign and date the application and submit it to your division superintendent/assistant superintendent/manager or supervisor. You must complete and sign this form **within a minimum of 20 working days before the workshop or course start date**. You may wish to keep a copy of the tuition reimbursement request for your own records.
- 3) Your division superintendent/assistant superintendent/manager or supervisor will review, sign and submit the request to MUNI Human Resources, Departmental Personnel Officer at address shown below (#3).
- 4) You will receive an approval letter from MUNI Human Resources prior to the course start date. If you do not receive a letter, please call the front desk at 415-554-4166.

Instructions AFTER the course:

- 1) Upon completion of the course or workshop, attach proof that you have either satisfactorily passed the course or attended the workshop. This can be a certificate of completion, attendance, or other documentation provided by the educational institution that verifies completion of the course or workshop.
- 2) Attach evidence of payment of your tuition and book cost(s). **ORIGINAL receipts** from the educational institution, a cancelled check (front and back), a credit card statement, or similar documents are all acceptable.
- 3) Send the Tuition Reimbursement request and supporting documentation to:
MUNI Human Resources
401 Van Ness Avenue, Room 320
San Francisco, CA 94102
Attention: Tuition Reimbursement

MUNI Human Resources will process the request and authorize Finance Division to process the payment of your Tuition Reimbursement Request.

Please Note:

- a) In order for funds to be reimbursed, **ORIGINAL receipts** must be submitted. **Reimbursement will NOT be processed without original receipts.**
- b) Incomplete or inconsistent information on Tuition Reimbursement Requests will be returned for correction or completion before processing.
- c) Late requests will be reviewed on a case by case basis or may still be denied. However, due to fiscal year end constraints, completion documentation for courses ending in April, May or June must be submitted by the 10th working day of July in order to be paid. (Note: If a course/seminar begins in one fiscal year and ends in the next, then the reimbursement would be paid from the next year's fund. Muni's fiscal year starts on July 1st and ends on June 30th).
- d) If an employee resigns from MUNI within two (2) years following completion of the training course, the amount of tuition reimbursement shall be repaid by the employee to MUNI by cash payment or out of the employee's last pay warrant or, if applicable retirement earnings.

