

	PUBLIC UTILITIES GROUP TRAINING SECTION	NUMBER: 10.10
	STANDARD OPERATIONS POLICY AND PROCEDURE	EFFECTIVE: February 9, 2009
	SUBJECT: TRAINING PROGRAM	

1. PURPOSE

- 1.1 To continue to develop and maintain a Public Utilities Group Training Program which ensures that all employees receive training necessary to carry out their jobs safely and efficiently, optimize individual performance and support employees in their ongoing career development.
- 1.2 To ensure that the Training Program is an integral part of the Public Utilities Group and that it fosters team building, increases safety and productivity, and enhances morale.

2. DEFINITIONS

- 2.1 MWWD: Metropolitan Wastewater Department
- 2.2 MATRS: MWWD Automated Training Request System
- 2.3 TIMS: Training Information Management System
- 2.4 ETDC: Employee Training and Development Center
- 2.5 MOC2: Metropolitan Operations Center Building 2
- 2.6 ITR: Interdepartmental Training Request

3. AUTHORITY

- 3.1 Public Utilities Group Director
- 3.2 Administrative Regulation 70.01, City Training Policy and Establishment of Training Advisory Committee
- 3.3 Administrative Regulation 70.30, Tuition Refund Plan
- 3.4 Administrative Regulation 70.40, Special Outside Courses of Instruction
- 3.5 Administrative Regulation 90.30, Travel Policy
- 3.6 Administrative Regulation 95.40, In-Town Reimbursable Expenses
- 3.7 Department Instruction 10.11, Public Utilities Group Certification Program

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- 3.8 Department Instruction 10.12, Public Utilities Group Financial Management Training
- 3.9 California Administrative Code Title 8, Section 3202 (Cal/OSHA)
- 3.10 Memorandum of Understanding, AFSCME-AFL-CIO Local 127
- 3.11 Memorandum of Understanding, Municipal Employees Association

4. **POLICY**

- 4.1 A well trained work force is essential for safe and efficient Public Utilities Group operations. To ensure that training opportunities are available to all personnel and to maintain compliance with Federal, State and local laws and regulations regarding training requirements, the Public Utilities Group has developed a comprehensive Training Program. This Training Program is designed to meet Federal, State, City and Divisional Department mandates, maintain or enhance job performance and assist employees in career development.
- 4.2 The Public Utilities Group supports opportunities for learning and interaction with other agencies performing similar functions. Such interactions can include meetings, joint seminars, participation in training sessions, field trips and related activities.

5. **SCOPE**

- 5.1 All participation by Public Utilities Group personnel in training and education activities shall be coordinated by the Public Utilities Group Training Section. In addition to standardization of registration and fee payments, this centralization enables the maintenance of complete and accurate training records.
- 5.2 This policy shall cover:
 - a. Internal Training - formalized training courses offered through the Public Utilities Group Training Program, including computer skills training and training provided by other City departments. These courses are coordinated and sponsored by the Training Section, as shown in the training program catalog or any other advertised catalog updates;
 - b. External Training – career-related courses offered by non-City training organizations which augment the Public Utility Group’s internal course offerings. These courses are sponsored by non-City training providers;

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	<ul style="list-style-type: none"> c. Formal On-the-Job Training - safety tailgates, seminars, vendor learning events and other specialized training presentations for Public Utilities Group staff, which may or may not follow a predetermined curriculum, and the employee may be held accountable for attending; d. College/University Classes - courses offered by accredited colleges, universities, or business trade schools which award academic credits, or courses taken to satisfy professional continuing education certificates and/or licensing requirements; e. Correspondence Programs - all self-study correspondence programs offered through other City departments, other governmental jurisdictions, or accredited schools; f. Conferences, Conventions, Symposia, or other meetings whose subject areas are pertinent to Public Utilities Group operation (i.e. AWWA conferences, etc); g. Certification - training applicable to the requirements for a specific classification; h. Web-based Training - courses that permit training to be taken through the Internet; and i. Computer-based training-courses that permit training to be taken at a convenient time and at the employee's own pace through the utilization of a computer with a specialized software program. 	
6.	<p><u>RESPONSIBILITY</u></p> <p>6.1 Under the supervision of the Public Utilities Group Training Manager, the Training Section shall:</p> <ul style="list-style-type: none"> a. In conjunction with supervisory personnel, identify training needs for employees in all job classifications; b. Locate training resources for identified training needs; c. Develop and maintain a comprehensive Public Utilities Group Training Program catalog which shall be revised and updated at least quarterly; 	
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	<ul style="list-style-type: none"> d. Monitor compliance with all training requirements of personnel according to their job assignments/occupational categories; e. Distribute to all supervisors and key personnel, information regarding upcoming training opportunities on at least a monthly basis; f. Monitor the enrollment and attendance of employees in training; g. Prepare quarterly training activity reports which provide Appointing Authority with appropriate feedback and track data including information on employees who fail to attend, or successfully complete trainings; h. Notify the supervisor of employee behavior observed in trainings which is substandard, inappropriate or disruptive to the instruction process; i. Maintain accurate training records for all Public Utilities Group employees and Group sponsored training activities using the Training Information Management Systems (TIMS); j. Provide ongoing training support to operating Divisions as requested, to ensure that training resources are appropriate to the changing needs of Public Utility Group employees; k. Assist in developing appropriate course materials and instructor training; l. Coordinate the Public Utilities Group Certification Program, which identifies voluntary and mandatory certifications (see SOPP 10.11.); m. Coordinate the Public Utilities Group Financial Management Training, which identifies mandatory training for financial and debt management personnel (see SOPP 10.12); n. Coordinate with other City organizations as needed and act as internal consultants on organizational development issues by providing communication skills training, organizational development support, career development counseling and professional growth services; o. Represent the Public Utilities Group at City-wide Trainers meetings and act as a liaison with the Labor Relations Manager for training and employee development related issues; and 	
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- p. Initiate appropriate rewards and recognition for instructors or employees who otherwise support and assist the Public Utilities Group training function by serving on task forces or acting as technical experts or coordinators.

6.2 Appointing Authority Managers shall be responsible for:

- a. Ensuring that the Public Utilities Group training goals are implemented within their Division;
- b. Reviewing the mandatory, required and recommended training course requirements for their Division to verify that they are current and reflective of the employees changing needs;
- c. Consulting with the Training Section to identify training opportunities and/or deficiencies within their Division as part of an ongoing analysis.

6.3 It shall be the responsibility of the Training Section to:

- a. **For Water Divisions:** Enroll employees in training courses within appropriate time lines;
- b. Forward employee's copy of the confirmation to the employee's supervisor.
- c. **For MWWD Divisions:** Maintain the MATRS and its procedures.
- d. Update and maintain the training needs of the Public Utilities Group employees utilizing TIMS.

6.4 Public Utilities Group Supervisors shall be responsible for:

- a. Coordinating with the Training Section to ensure that their new employees are provided all training which is mandated or required prior to beginning work activities;
- b. Contacting the Training Section a minimum of one (1) working day prior to the scheduled start time of a training if subordinate employees are unable to attend as enrolled;
- c. Noting the date, time and location of training in the employee's work schedule;
- d. Consulting with the Training Section on an ongoing basis to ensure that trainings are appropriate to the changing needs of employees in the workplace;

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- e. Providing technical skill and site-specific training to subordinate employees, documenting technical skill, site-specific training, tailgate, line-up, or equivalent trainings and supplying copies of training documentation (see Tab 3) to the Training Section within three (3) working days;
- f. Authorizing release time for personnel to attend training courses, including necessary travel time to and from course;
- g. Authorizing release time for personnel who serve as instructors, to develop course materials, to arrive prior to the designated course time, to teach and clean up the instruction area;
- h. Verifying approval of Public Utilities Group Director and Appointing Authority for travel required for out-of-town training courses and also making necessary travel arrangements (See A.R. 90.30, Travel Policy);
- i. Ensuring that Employee Performance Plans include training standards for all employees; Employee Performance Review Plans must include a standard for evaluating active participation in training. Supervisor Employee Performance Review Plan must also include a standard for ensuring their subordinates complete all mandated and required training.
- j. Distributing schedules, rosters and training announcements to personnel in a timely fashion;
- k. **For Water Divisions:** reviewing, at least quarterly, the training catalog mandatory, by-law delinquency reports, training requirements of their personnel and submitting an Internal Training Request form, UW-1531 (Tab 1) to the Training Section;
- l. **For MWWD Divisions:** reviewing, at least quarterly, the training catalog mandatory, by-law delinquency reports, training requirements of their personnel, reviewing all training requests received from MATRS, and submitting Interdepartmental Training Request forms, UW-41 (Tab 8) to the Training Section when necessary.
- m. Assisting subordinate employees in identifying their training needs and encouraging employees to attend performance or skill development training which will enhance their work performance and promote career development;

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- n. Ensuring that all subordinate employees are scheduled for and attend appropriate training courses for their occupational category and job duties within 30 days of the employee becoming delinquent.

6.5 Public Utilities Group employees shall be responsible for:

- a. Attending courses assigned, or notifying his/her supervisor of schedule conflicts;
- b. Arriving at training on time and bringing specified materials, and participating actively in his or her training and demonstrating comprehension and skills competency of the materials covered in the trainings to the satisfaction of the instructors;
- c. Demonstrating appropriate classroom behavior;
- d. Legibly signing their name and providing accurate employee identification number on the course roster while ensuring that all line information is correct, then signing out on the roster upon completion of the course.

7. **PROCEDURE**

7.1 Internal Water Training

- a. All supervisors shall continually review the training requirements of their personnel and submit either an Internal Training Request, UW-1531 (Tab 1) or Interdepartmental Training Request form, UW-41 (Tab 8) to the Training Section.
- b. The Internal Training Request forms must be received in the Training Section (via interoffice mail, fax or hand delivery) a minimum of five (5) working days prior to the date of the requested course.
- c. The Training Section shall, on a first-come basis, establish a roster for the course. If requested dates are filled, the supervisor will be informed and given information on alternative dates.
- d. Upon completion of the registration process, the Training Section will send confirmation copies of enrollment to the supervisor. Upon receiving confirmation, the supervisor shall verify that the employee is available on the date of training and forward the employee confirmation copy.

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- e. Class rosters for internal courses shall be distributed to senior supervisors in the week preceding the course via the Class Connection.
- f. If employee utilizes an Interdepartmental Training Request, the forms must be received in the Training Section (via interoffice mail, fax or hand delivery) a minimum of three (3) working days prior to the date of the requested course.
- g. Employees who do not attend pre-registered courses shall be entered in TIMS as a "No Show" and will not receive credit.

7.1.2 Internal MWWD Training

- a. All supervisors shall continually review the training requirements of their personnel and notify them of said requirements.
- b. Personnel shall choose from available course dates and enroll in appropriate course(s) either through MATRS or Interdepartmental Training Request form, UW-41 (Tab 8).
- c. If employee utilizes MATRS, each supervisor is notified by MATRS via email requesting their approval. On a first-come, first-served basis, when approved on both levels, employee is added to the course roster and automatically notified via email by MATRS. If denied, employee is notified via email by MATRS and will also be notified directly by their supervisor.
- d. Personnel are required to request the course at least 5 days prior to the scheduled date.
- e. Class rosters for internal courses shall be distributed to senior supervisors in the week preceding the courses via the Class Connection.
- f. If employee utilizes an ITR, the forms must be received in the Training Section (via interoffice mail, fax or hand delivery) a minimum of five (5) working days prior to the date of the requested course.
- g. When an ITR is submitted, the Training Section shall, on a first-come, first-served basis, establish a roster for the course. If requested dates are filled, the supervisor will be informed and given information on alternative dates.
- h. Upon completion of the registration process, the Training Section will send confirmation copies of enrollment to the supervisor. Upon receiving confirmation, the supervisor shall verify that the employee is available on the date of training and forward the employee confirmation copy.
- i. Employees who do not attend a pre-registered course shall be entered in TIMS as a "No Show" and will not receive credit.

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7.2 Computer-Based Training

- a. Computer-based training is conducted on special computers located either at the ETDC or the MOC 2 PC Training Room. Contact the Training Section for a list of the current courses available.
- b. For the Water employees the Internal Training Request Form, UW-1531 (Tab 1) shall be completed and brought with the employee to the Training Section on the day of the training.
- c. For MWWD employees, please contact the Training Section for instructions and information, and specific training opportunities.
- d. Upon completion of the training, the employee's TIMS record will be updated.
- e. The employee shall call the Training Section to schedule a convenient time with a Trainer for administration of the training.

7.3 External Training

- a. Employees, including supervisors and managers, shall have all enrollments in these seminars, to be paid by the Public Utilities Group, processed through the Public Utilities Group Training Section.
- b. Fees for any enrollments initiated directly by an employee without prior approval shall be the responsibility of the employee.
- c. When externally available courses cover topic areas similar to internal courses, the internal course must be taken first. A waiver may be granted by the Training Section or Appointing Authority to employees assigned to external training as a result of a Performance Development Plan.
- d. Potential participants should submit the completed Request for External Training, UW-1433, (Tab 2) via their supervisor, to their Appointing Authority, who will approve or disapprove all requests for external training.
- e. External Training Requests must be forwarded to the Training Section for processing and records maintenance.
- f. The Training Section should receive all requests for external training at least three (3) weeks prior to the course start date, to ensure adequate time for space reservation and fee payment processing.

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- g. The Training Section will process requests and enroll employees. All requests that are unable to be processed or that are denied by the Appointing Authority will be returned to the employee by the Training Section.
- h. Participants will be notified promptly by the Training Section regarding their enrollment status.
- i. The specific benefit to the City from external course attendance should be commensurate with the total cost. The Training Section will review requests for content, cost effectiveness and organization impact.
- j. If travel expenses are to be incurred, the Appointing Authority shall review the request to ensure compliance with A.R. 90.30, Travel Policy. Travel must be approved by the Group Director prior to registration. An approved Out-of-Town Travel form, FM 1312 (Tab 7), must be submitted with the Request for External Training, UW-1433 (Tab 2).
- k. After completion of travel, return completed Out-of-Town travel form, #FM 1312 and appropriate receipts to the Public Utilities Group's designated travel coordinator.
- l. Course materials obtained at external trainings beyond student workbooks, remain the property of the Public Utilities Group. Employees attending external trainings are encouraged to disseminate information obtained at external courses to their immediate workgroup.
- m. Qualified employees wishing to be enrolled in Operator Courses offered by California State University, Sacramento (Office of Water Programs) shall complete and forward a Request for External Training, UW-1433 (Tab 2) to the Training Section.
- n. Enrollments will be processed for one course at a time. Proof of completion certificate must be forwarded to the Training Section before employee will be enrolled in another Operator Course.
- o. Operator Courses in progress will be entered into TIMS as "Incomplete" until a copy of the certificate of completion is received by the Training Section. At that time the course completion indicator will be changed to "Complete".

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7.4 Formal On-the Job Training

- a. Appropriate safety tailgate, site-specific and technical and skill development trainings conducted at the worksite shall be provided to employees prior to employees being allowed to perform duties in potentially hazardous situations.
- b. Records which include course title, date, length of training, information covered, name of instructor, signatures and complete identification numbers of attendees shall be maintained by the supervisor.
- c. Within one (1) day of the training a completed Public Utilities Group Safety and Training Roster shall be sent to the Training Section for TIMS data entry, to maintain employee training history.

7.5. College/University Courses

- a. Courses offered by eligible institutions and are MOU applicable shall be covered by provisions of the City's Tuition Reimbursement Plan (See AR 70.30, Tuition Refund Plan).
- b. An Education Plan (Tab 4) shall be submitted for approval prior to seeking tuition reimbursement. Employees seeking tuition reimbursement courses shall complete and forward the Request for Approval of Tuition Reimbursement, CM 1578 (Tab 5) to his or her Appointing Authority a minimum of three (3) weeks prior to the start of the course.
- d. The Appointing Authority shall forward the form with his or her recommendations for approval or disapproval to the Public Utilities Group Training Section.
- e. The Training Section shall return a copy of the completed request to the employee for his or her records.
- f. Upon satisfactory completion of the course, the employee shall forward a copy of his or her passing grade (minimum "C") along with original receipts describing each item of reimbursable expense and course relationship, to the Training Section.
- g. Following verification, the Training Section shall initiate the Direct Payment request to reimburse the employee.

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7.6 Correspondence Programs

- a. Employees wishing to enroll in correspondence courses shall contact the Training Section prior to commencing any program for which fees are requested to be paid by the Public Utilities Group.
- b. College units of credit for Operation Courses by California State University, Sacramento (Office of Water Programs) follow the Tuition Reimbursement process. A Request for Approval of Tuition Reimbursement, CM 1578 (Tab 5) must be filed prior to the start of the course.

7.7 Conferences, Conventions, Symposiums of Professional Organizations

- a. The Training Section shall initiate registration and fee payment for personnel attending work related conferences, conventions, seminars, etc.
- b. All requests for special outside training at educational institutions, other governmental agencies, or commercial companies shall be in accordance with AR 70.40, Special Outside Courses of Instruction.
- c. Copies of any announcements, registration forms, or other materials should be submitted to the Training Section along with an External Training Request form, UW-1433 (Tab 2).
- d. If travel expenses are incurred, the Appointing Authority shall initiate the appropriate administrative action to insure compliance with AR 90.30, Travel Policy. Travel must be approved by the Public Utilities Group Director prior to registration.

7.8 Web-Based Training:

- a. Under certain conditions, external training courses conducted by non-City training providers may be obtained through the use of the Internet. See External Training, Section 6.2, for procedures to follow when utilizing this format of training.
- b. Under other conditions, request for reimbursement of fees for approved web-based training courses fall within the guidelines of Section 6.4, College/University Courses.
- c. Future internal department training, those courses offered through the Public Utilities Group Training program, may be available through the City's website.

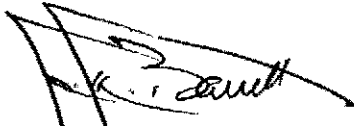
**PUBLIC UTILITIES GROUP
TRAINING SECTION**

NUMBER: 10.10

**STANDARD OPERATIONS POLICY
AND PROCEDURE**

**EFFECTIVE:
February 9, 2009**

SUBJECT: TRAINING PROGRAM



**J. M. Barrett
Public Utilities Group Director**

- Tab: 1. Internal Training Request (UW-1531)
2. External Training Request (UW-1433)
3. Safety & Training Report (US 1611)
4. Educational Plan
5. Request for Approval of Tuition Reimbursement (CM 1578)
6. Request for Certification Reimbursement (UW-1621)
7. Out-of-Town Travel (FM 1312)
8. Interdepartmental Training Request Form

APPENDIX

Administering Division: Administration Division, Office of Human Resources

Subject Index: Department Training
Training Requests
Tuition Reimbursement

Distribution: SOPP Manual Holders

DATE: _____

Fund# _____ Dept. # _____

Org. # _____ Obj. Acct. # _____

Job Order # _____ Oper. # _____

**PUBLIC UTILITIES GROUP
TRAINING SECTION
INTERNAL TRAINING REQUEST**

COURSE TITLE	CLASS DATE	CLASS TIME	PRINT NAME	CITY ID NUMBER	TRAINING SECTION CONFIRMATION
<i>EXAMPLE: First Aid</i>	<i>1/9/03</i>	<i>8:30 - 4:00</i>	<i>John Smith</i>	<i>#####</i>	

APPROVED DENIED

Immediate Supervisor (Print Name) Immediate Supervisor's Signature Dept. # / Name MS Phone No.

DISTRIBUTION: Send the white, canary, and pink copies to the Water Department Training Office, MS-43A. The goldenrod copy is for your records. The canary and pink copies will be returned to the Immediate Supervisor.

NOTE : All Internal Training Requests, even those denied by the supervisor, should be sent to the Training Office, MS-43A.

REQUEST FOR EXTERNAL TRAINING

DATE _____

MAIL STATION _____ PHONE _____

NORMAL WORK SCHEDULE _____ TO _____

(Please Circle) M T W TH F S S

DEPT.# _____	
OBJ. ACCT.# _____	J.O.# _____
ORG.# _____	OPER# _____
Training Office Use Only	
DF# _____	Approved _____
_____	Enrolled Date _____
_____	By _____

NAME _____ CLASSIFICATION _____

CITY ID # _____ DIVISION _____ SECTION _____

I REQUEST AUTHORIZATION TO ATTEND THE FOLLOWING COURSE (ATTACH A COPY OF THE TRAINING FLYER OR REGISTRATION FORM):

NAME OF COURSE _____

DATE(S) _____

COST \$ _____ TRAINING PROVIDED BY _____

LOCATION * _____

* OUT OF TOWN TRAVEL MUST HAVE A FORM FM - 1312 (TRAVEL REQUEST AND EXPENSE REPORT) ATTACHED AND MUST BE ROUTED SIMULTANEOUSLY WITH THIS FORM (REFER TO A.R. 90.30).

PURPOSE OF THIS COURSE AND ITS VALUE TO DEPARTMENT AND CITY. _____

PLEASE EXPEDITE: TRAINING OFFICE MUST RECEIVE THIS FORM 3 WEEKS PRIOR TO CLASS DATE TO ALLOW PROCESSING TIME (D.I.O.10).

DATE	SIGNATURES	RECOMMEND APPROVAL	RECOMMEND DENIAL	REASON
	1. _____ IMMEDIATE SUPERVISOR	<input type="checkbox"/>	<input type="checkbox"/>	
	2. _____ DEPUTY DIRECTOR	<input type="checkbox"/>	<input type="checkbox"/>	
	3. _____ DIRECTOR*	<input type="checkbox"/>	<input type="checkbox"/>	

* DIRECTOR APPROVALS MUST BE OBTAINED IF OVERNIGHT, OUT OF TOWN TRAVEL IS INVOLVED WITH THIS REQUEST.

ALL REQUESTS, WHETHER APPROVED OR DENIED, MUST BE FORWARDED TO THE PUBLIC UTILITIES GROUP TRAINING OFFICE, MAIL STATION 43A. THE TRAINING OFFICE WILL SCHEDULE ALL APPROVED COURSES AND NOTIFY THE EMPLOYEE AND IMMEDIATE SUPERVISOR AS SOON AS THE ENROLLMENT IS CONFIRMED BY THE TRAINING PROVIDER.

REIMBURSEMENT OF EXPENSES: ONE COPY OF THIS FORM MUST BE ATTACHED TO ANY REQUESTS YOU SUBMIT FOR REIMBURSEMENT OF TRAVEL OR MISCELLANEOUS EXPENSES (PARKING, MEALS, ETC.) WHICH YOU MAY HAVE INCURRED AS A RESULT OF THIS TRAINING.

DISTRIBUTION: MAIL TO TRAINING OFFICE AT MAIL STATION 43A. WHEN ENROLLMENT IS COMPLETED: COPY - SENT TO EMPLOYEE. COPY - SENT TO SUPERVISOR. ORIGINAL - RETAINED BY TRAINING OFFICE.

CITY OF SAN DIEGO PUBLIC UTILITIES GROUP

SAFETY AND TRAINING REPORT

DATE OF TRAINING _____ DIVISION _____

SAFETY TOPIC PRESENTED _____

REFERENCE MATERIAL USED IN PREPARATION FOR THIS PRESENTATION _____

SUPERVISOR _____ SECTION _____

COMMENTS MADE BY PARTICIPANTS REGARDING PRESENTATION _____

INSTRUCTOR _____ CITY ID # _____

Name of each person in attendance

LAST NAME (PRINT)	SIGNATURE	CITY ID #	LAST NAME (PRINT)	SIGNATURE	CITY ID #

ELAPSED TIME OF PRESENTATION	NUMBER IN ATTENDANCE	TOTAL TRAINING HOURS
_____	_____	_____
	x	= 0

**CITY OF SAN DIEGO ADMINISTRATIVE REGULATION 70.30
EDUCATION PLAN**

Instructions:

1. Complete and submit to the Appointing Authority for approval.
2. After approval, forward to the Public Utilities Training Section MS 43A.

Employee Name: _____

Classification: _____

EDUCATIONAL GOAL

- Attain an Associate Degree in _____
 - Attain a Bachelor Degree in _____
 - Attain a Master Degree in _____
 - Attain a Doctorate Degree in _____
 - Continuing Professional Education requirements for _____
 - Maintain or improve skills for my current Position. Type of skill (s) _____
- _____

COURSES/CLASSES TO MEET EDUCATION GOAL

Course No.	Course Title	Core	Elective

Employee Signature: _____

Date: _____

Appointing Authority Signature: _____

Date: _____

REQUEST FOR APPROVAL OF TUITION REIMBURSEMENT

Instructions:

1. Refer to Administrative Regulation 70.30 for policies and procedures on the City's Tuition Reimbursement Plan.
2. Before course is taken, employee completes this request; obtains appointing authority approval; and submits to Departmental Training Coordinator.
3. After course is completed, employee submits grade or proof of completion and original receipts to Departmental Training Coordinator.
4. Departmental Training Coordinator will input information into City Automated Personnel Payroll System (CAPPS).
5. Tuition reimbursements will be included in the employee's biweekly paycheck. Tuition reimbursements, under certain circumstances, may be considered taxable income in accordance with the Internal Revenue Code.

Employee Name		Department / Division Name		City ID #	Mail Station	Work Phone No.	
Type*	Title of Course	Course No.	Name of School		Start Date	End Date	Estimated Cost
RG / TR							
Total Estimated Cost							\$0.00
QUESTIONS TO BE ANSWERED BY EMPLOYEE						YES	NO
Do you currently have supervisory responsibilities?						<input type="checkbox"/>	<input type="checkbox"/>
Was this course attended on City time?						<input type="checkbox"/>	<input type="checkbox"/>
Is this a course that is part of an educational plan leading towards a college degree (Associate, Bachelor, etc.)?						<input type="checkbox"/>	<input type="checkbox"/>
Is this education required by the City or the law to keep your present salary, status, or job?						<input type="checkbox"/>	<input type="checkbox"/>
Does this education maintain or improve skills needed in your present work?						<input type="checkbox"/>	<input type="checkbox"/>

*RG for Semester or Quarter courses. TR for training or seminars (self-directed).

I, the undersigned employee, certify I am not receiving funds from any other source for the above listed courses. These courses are included in my Educational Plan dated _____ previously approved by the Appointing Authority.

Employee Signature: _____

Date: _____

APPOINTING AUTHORITY APPROVAL: To the best of my knowledge the above information is correct as stated and this tuition reimbursement request is approved.

Appointing Authority Signature: _____

Date: _____

Charge to: Fund: _____ Dept: _____ Org: _____ Acct: _____ Job Order: _____ Oper Acct: _____

REQUEST FOR CERTIFICATION REIMBURSEMENT

ADMINISTRATION USE ONLY:	
<input type="checkbox"/> Budgeted/Approved	<input type="checkbox"/> Unbudgeted/Disapproved
Fund # _____	Dept. # _____
Org. # _____	Obj. Acct. # _____
JO # _____	
Budget Analyst/Date _____	

Instructions:

- This form is to be used for reimbursement of Voluntary Certification application, examination, and recertification fees only. Refer to Department Instruction 10.11 for policies and procedures regarding training associated with certification.
- Before examination is taken, applicant completes reimbursement request and obtains supervisor and appointing authority approvals. Employee retains goldenrod copy as record of submittal and forwards remaining 3 copies to the Training Office.
- Upon receipt of reimbursement request, the Training Office sends pink copy to employee, and retains 2 copies.
- After the examination has been successfully passed or recertification has been issued, applicant submits proof of certification and original receipts to Training Office.
- Training Office processes Request for Direct Payment attaching Original and 1 copy of Form UW-1621 and submits to Auditor's Office for payment. Canary copy is retained by the Training Office.
- The Auditor's Office sends warrant directly to applicant.

COMPLETED BY APPLICANT

Name	City ID #	Division/Section	MS	Work Phone
Payroll Job Title		Date of Request	Date of Examination	
Name of Certification Requested / Grade Level		Provider	Estimated Cost	
Please select one. This certification is: <input type="checkbox"/> required for my current position <input type="checkbox"/> specifically related to my current job duties <input type="checkbox"/> cross disciplinary		Please select one. This request is for: <input type="checkbox"/> certification exam <input type="checkbox"/> recertification fee <input type="checkbox"/> initial certification fee		

Applicant's Signature _____ Date _____

COMPLETED BY SUPERVISOR

Was this employee's last Performance Appraisal satisfactory or above?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Is this employee currently in an hourly or limited status?	<input type="checkbox"/>	<input type="checkbox"/>
If this is for a cross-disciplinary certification, has this employee previously obtained certification related to their current position?	<input type="checkbox"/>	<input type="checkbox"/>
Supervisor Signature _____		Date _____

APPOINTING AUTHORITY APPROVAL

To the best of my knowledge the above information is correct as stated.	
Appointing Authority Signature _____	Date _____

TRAINING OFFICE USE ONLY

Reimbursement Request Date _____	DP Date _____	DP # _____	Amount _____
Comments:			

CITY OF SAN DIEGO TRAVEL EXPENSE REPORT											
1. NAME OF TRAVELER				2. TITLE			3. DEPT NO.				
4. EVENT				5. BENEFITS TO BE DERIVED BY THE CITY THROUGH ATTENDANCE							
6. DATE(S) OF MEETING			7. DEPARTURE DATE		8. RETURN DATE		9. DESTINATION				
10. ACCOUNTING LINE											
		FUND	DEPT	ORG	ACCT	JOB ORDER					
11. TRAVEL ADVANCE (COMPLETE BOXES 1 - 11, 13 - 16, 28)				<input type="checkbox"/>		A D V A N C E		13. TRANSPORTATION			
12. FINAL TRAVEL REPORT (COMPLETE BOXES 1 - 10, 12 - 28)				<input type="checkbox"/>				14. LODGING			
								15. PERDIEM			
								16. TOTAL ADVANCE REQUESTED		0.00	
F I N A L T R A V E L R E P O R T	DAY 17. DATES		SUNDAY	MONDAY	TUESDAY	WED	THUR	FRIDAY	SATURDAY	TOTAL	
	18. TRANSPORTATION										0.00
	19. TAXIS/SHUTTLE										0.00
	20. LODGING										0.00
	21. TELEPHONE/INTERNET										0.00
	22. PERDIEM										0.00
	23. LESS: MEALS PROVIDED										0.00
	24. REGISTRATION										0.00
	25. OTHER										0.00
	TOTALS										0.00
28. I certify the foregoing statement is correct.						16. LESS: TRAVEL ADVANCE					
Signed _____ Date _____						26. LESS: DIRECT PAID EXPENSES					
						27. LESS: MILEAGE					
Approved _____ Date _____						DUE CITY (DCR # _____)					
						DUE TRAVELER					
FINAL TRAVEL EXPENSE REPORT MUST BE FILED WITHIN THREE DAYS AFTER COMPLETION OF TRIP. Attach original receipts for all expenses claimed M&IE Per diem.											

FM-1312 (Rev 07/08)

Line	Instructions
13	Advanced transportation includes airfare, train tickets, and quoted rental car fees only.
14 & 20	Every effort must be made to secure lodging within the U.S. General Services Administration Per diem guidelines established. If there are no hotels available at per diem, an appointing authority may authorize or approve a higher rate. Lodging taxes are not included in the CONUS per diem rate. A printout of the current GSA Per diem rate for the destination must be attached.
15 & 22	Per diem must be reduced by any meals included in the registration fees for an event. 75% of the Meals & Incidental Expense (M&IE) is allowed on the first and last days of travel. A printout of the current GSA Per diem rate for the destination must be attached.
18	Transportation includes airfare, train tickets, rental cars, and mileage. Mileage is reimbursed through payroll via a completed form AC-1145, Mileage Report. A copy of the completed AC-1145 must be attached to the expense report. Transportation expenses paid directly by the City should also be included here.
21	Telephone/Internet includes business phone calls, business use internet access fees and wireless internet fees, and personal calls not to exceed \$10/day.
23	M&IE per diems must be reduced for meals included in the registration fees for an event. The GSA website (www.gsa.gov/mie) provides a breakdown of breakfast, lunch, and dinner components of the maximum daily reimbursement rates for meals and incidentals.
24	Include registration paid directly by the City.
26	Direct paid expenses should include all expenses paid directly by the City; airfare, registration, etc.
27	Mileage reimbursed must be included here (and on line 18). Mileage is reimbursed through payroll via a completed form AC-1145, Mileage Report. A copy of the completed AC-1145 must be attached to the expense report.

INTERDEPARTMENT REQUEST FOR TRAINING

All information is required for the processing of this Request For Training
 Return to: Training MS# 43A / FAX: 619-668-2066

PUBLIC UTILITIES GROUP
 TRAINING SECTION
 5510 KIOWA DRIVE LA MESA CA 91942
 MS# 43A PHONE: 619-668-2010

DATE _____

DEPARTMENT NAME _____

FUND # _____ DEPARTMENT # _____

ORG # _____ JOB ORDER # _____

REQUESTING SUPERVISOR NAME *(Print)*

REQUESTING SUPERVISOR SIGNATURE

SUPERVISOR PHONE # / MAIL STATION #

_____ APPOINTING AUTHORITY NAME <i>(Print)</i>	_____ TITLE	_____ APPOINTING AUTHORITY SIGNATURE
SIGNATURE IS APPROVAL FOR THE INTERDEPARTMENT TRANSFER OF FUNDS TO PUBLIC UTILITIES GROUP FOR TRAINING COSTS FOR THE EMPLOYEES NAMED BELOW		

Course Title	Course Date	Course Time	Employee Name	Employee City ID #	Training Section Confirmation