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ALLOWANCE AMOUNTS

Is my benefit allowance based on my actual hours worked?

No. Your benefit allowance is based upon your position's allocated FTE and bargaining unit.

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Are extra-help employees eligible for the Staff Development benefit?

No.

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I looked up my allowance amount using the Staff Development database online. What do the different amounts mean?

Your total available allowance is the sum of your balances. The Staff Development/Wellness allowance may be used towards either staff development or wellness expenditures. However, the staff development allowance (SD) can only be used toward directly related job education, professional growth, and licenses and professional certificates. If you still have questions about your benefit amount, refer to your bargaining unit's MOU or contact us at staffdev@sonoma-county.org.

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How is my allowance adjusted when I promote or change bargaining units in the middle of the fiscal year?

Eligible employees who promote or change bargaining units are adjusted by taking the new allowance less any amounts expended during the fiscal year. FTE adjustments are addressed in accordance with the respective MOU.

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CLAIM SUBMISSION

A training/conference/class I would like to attend takes place 3 months in the future but requires advance registration and payment. If I register and pay now, can I be reimbursed now, or must I wait until after the training/conference has taken place?

You can request reimbursement as soon as the out of pocket cost has been incurred.

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I'm submitting a claim for \$50, but I only have \$25 left in my account. Do I need to modify my claim amount to match the balance left in my account?

No. You will only be reimbursed with what is remaining in your account.

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How long does it take for reimbursement to appear on my paycheck?

The turnaround time is indicated as the estimated "Pay Date" on the notification e-mail from Sonoma-County-eForms@sonoma-county.org. Typically claims filed between September and May are reimbursed as quickly as possible (usually 2-3 weeks) with consideration for additional information needed to process the claim (eg. clearly legible receipt, explanation how the purchase is directly related to the job class title).

Due to a very large volume of fiscal year end claims, it could take longer for claims submitted between June and August. Claims for the new fiscal year allowance (July 1) have a delayed processing time due to closing out the large volume of old fiscal year claims. The new fiscal year claims are typically processed in August at which time the new

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fiscal year allowances are loaded into the Staff Development system. You are encouraged to consider the impact on your personal finances with delays in reimbursements for July and August claims.

Newly hired employees can take up to five weeks to appear in the Staff Development Database in order to process in payroll, however once you have an employee ID Number you can file a claim.

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Is there any way for vendors to be paid directly?

No. Under the Staff Development program, employee reimbursement is a required component of the program.

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PREVIOUS FISCAL YEAR SUBMISSIONS

I paid in advance last fiscal year for a class that takes place this fiscal year. Can I be reimbursed using my current fiscal year allowance?

No. Claim reimbursements are based on a cash basis/constructive receipt on the date the payment was made.

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I paid for a class last fiscal year that started last fiscal year and ended during the current fiscal year. Can I be reimbursed for the class?

Claim reimbursements such as these are based on a cash basis/constructive receipt on the date the payment was made, regardless of the date of the training/conference. Be sure to meet the Staff Development fiscal year end claim submission deadline.

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What is the fiscal year end deadline for claim submissions?

The staff development allowance is a fiscal year benefit meaning that you can incur the cost between July 1-June 30. The deadline to incur an allowable cost is June 30. The deadline to submit an eForm for the old fiscal year end processing is usually the first Friday of July in the new fiscal year. (e.g. For the Fiscal Year 2018/2019 allowance and a \$100 receipt dated June 29, 2019, the eForm must be submitted successfully by the first Friday of July or July 5, 2019, or on the next business day if it is an observed holiday).

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REQUIRED DOCUMENTATION

Is proof of completion required for class/training reimbursements?

A Certificate of Completion is not required for reimbursement.

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If I use a credit card to make a purchase, does the name on the credit card statement have to match my name?

The name printed on the credit card should match the employee name. We understand that some households use a family credit card. If that is the situation, please make an explanation the description of the eForm claim.

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If submitting a credit card statement as proof of payment, should I block out other purchases not pertinent to my claim?

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We recommend that you do this, but it is up to you to protect your privacy.

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When is a Professional Development Plan required? Can I buy used equipment that is not sold by a retailer?

HR Admin does not require a professional development plan be submitted with the eForm claim, however, your department may have their own requirements. Please check with the appropriate HR Liaison in your department if there are any questions about internal department requirements.

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Can I buy used equipment that is sold by non-retail?

If you buy used equipment that is not sold by a retailer such as Craigslist or a garage sale you can provide documentation that provides information similar to a store receipt that should include (Sales Date, Item Description, Seller Name, Sales Price, and picture if available).

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COMPUTER/ELECTRONIC DEVICE PURCHASES

Why is my computer/mobile device purchase considered “taxable”?

According to IRS regulations, all electronic purchases are taxable if they become the property of the employee.

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Are electronic device warranties and/or service agreements allowable?

No. Warranties and service agreements are not allowable expenses.

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Is a Professional Development Plan required for electronic device purchases?

HR Admin does not require a professional development plan be submitted with claims, however, your department may have their own requirements. Please check with the appropriate HR Liaison in your department if there are any questions about internal department requirements.

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TRAVEL

From which point is mileage calculated when I travel for business?

You are not eligible to be reimbursed for your usual work commute, only those miles in excess of your normal commute. Calculate miles starting from your work address if you drive past there to get to your travel destination or from home if it is closer. This only applies when you travel during your normal work hours.

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PHYSICAL FITNESS/WELLNESS

If I have a “couples” or “family” gym membership, how do I request full reimbursement for myself?

Go online or request documentation from your gym detailing the cost of an “individual” membership to be reimbursed at that rate. Employees can only be reimbursed for individual fees, not for additional family members. Submit this

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documentation along with proof of payment. If you signed up for a “couples” gym membership and do not provide documentation of the cost of an “individual” membership, you can be reimbursed for 50% of the “couples” membership.

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I am already signed up at a gym and monthly fees are automatically deducted from my bank account. Can I receive reimbursement?

Yes. Go online, use emailed payment confirmations, or request a statement from your gym showing dates of service and payments made and submit this with your claim.

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I signed up for an annual gym membership during the last fiscal year. The membership is for the current calendar year. Can I be reimbursed for the months that occur during the current fiscal year?

No. Claim reimbursements are based on a cash basis/constructive receipt on the date the payment was made.

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The Staff Development program specifically excludes “entry, participation or league fees” for a team/ group activity under the wellness/physical fitness benefit. Are gym membership/initiation fees the same thing?

No. Membership/initiation fees are a required part of the cost of gym membership and, therefore, are an eligible expense.

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What types of fitness programs are allowable under the physical fitness/wellness benefit?

The program may be used for activities by allowing participation in a wide variety of activities that promote physical fitness.

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Are fitness software apps, DVD’s, and fitness video games eligible for reimbursement?

Yes, but the electronic consoles and controllers are not eligible.

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What sort of documentation should I include for a physical fitness/gym claim?

Documentation should clearly indicate dates of service or membership, proof of payment, and type of membership/services purchased (e.g. individual membership).

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Can I purchase a County of Sonoma Regional Parks Membership with my wellness/physical fitness benefit allowance?

Yes.

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Are massage chairs and mattresses eligible for reimbursement?

No. These items are considered furniture which is not covered under the benefit.

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Are psychotherapy and hypnotherapy eligible for reimbursement?

No. The goal of the Physical Fitness/Wellness benefit is to provide employees as many options and as much flexibility as possible to find a physical activity which promotes aerobic exercise, flexibility, and/or strength training. Costs for

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massage, acupuncture and chiropractic visits are eligible because they help employees maintain their bodies in order to sustain a physically active lifestyle.

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What is a “Class 1” electric bicycle?

California Vehicle Code Section 312.5 defines an electric bike as a “bicycle with fully operable pedals and an electric motor of less than 750 watts (1 horsepower)”. It listed three electric bike classes with different speed limits and rules to make things clearer for buyers. Manufacturers also need to label their bikes with the class number, stop speed, and watt rating. These are the common classes referred to in the US.

First off you should know the following info: What Is Pedal Assist / What Is Throttle?

- Pedal assist means that the motor power only kicks in when you pedal. It’s there to give you an extra boost and stops when you stop pedaling. Most bikes have different levels of assist you can select.
- Throttle e-bikes power the motor without pedaling. You can get full twist throttles like a motorbike, half twist which are smaller, or even thumb or finger levers.

E-Bike Classes	Covered Under the Benefit?	Description	Top Speed (Assisted)	Max Power
Class 1	Yes	Low speed pedal-assisted electric bike	20 mph	750 watts
Class 2	No	Low speed throttle-assisted electric bike	20 mph	750 watts
Class 3	No	Speed pedal-assisted electric bike	28 mph	750 watts

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EMERGENCY PREPAREDNESS

What is the new Emergency Preparedness category for staff development allowance?

The County of Sonoma is committed to provide efficient and high quality services to the community and recognizes the importance of developing and maintaining the knowledge, skills, and well-being of our workforce to achieve this goal. Specifically, the Staff Development Benefit Allowance Program provides an annual reimbursement allowance to assist County employees to: achieve professional and educational growth; achieve personal wellness and physical fitness; and, be resilient in times of emergency or disaster to ensure they are prepared, and, therefore, better able to fulfill the role as Disaster Service Workers.

As County employees are required to serve as Disaster Service Workers (Cal. Govt. code 3100 et. seq.) expansion of this benefit to include designated emergency preparedness supplies supports the County’s mission to encourage County employees and their families to be better prepared for an emergency or disaster. This preparation enhances the County’s ability to provide continuity of County services to the community during an emergency or disaster.

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What items are eligible and excluded for the Emergency Preparedness benefit?

Allowable Items:

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In support of this initiative, the following items are included as eligible reimbursable expenses under the new category of Emergency Preparedness in the Staff Development/Wellness Benefit Allowance Program:

- Portable generators and emergency power battery systems (equipment costs only)
- Personal and family pre-configured emergency/disaster kits/ first aid kits (purchased as a package)
- Hand crank radios
- National Oceanic and Atmospheric Administration (NOAA) weather radios

Exclusions:

- Weapons
- Provisions for pets or animals
- Transportation
- Clothing
- Two-way radios
- Medical supplies
- Water purification and storage systems
- Temporary living structures such as tents
- Individual items that are intended to be for “build it yourself” emergency kits
- Installation costs
- Warranties and service contracts
- Repair costs
- Extension cords

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When can I begin to file claims for Emergency Preparedness items?

On July 9, 2019 the Board of Supervisors approved the Emergency Preparedness as a new category in the Staff Development and Wellness allowance. On October 17, 2019, the eForm will allow you to file a claim with receipts showing a date of purchase on or after July 9, 2019.

If you purchased eligible expenses and lost your receipt, you may ask the store to look up a copy of the receipt and provide a copy in the eForm; obtain an online copy of the product purchased showing the price and a bank or credit card statement that evidences the payment to the seller and provide a copy in the eForm.

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Does my allowance increase because of the addition of the new category for Emergency Preparedness items?

No. Employees' Staff Development benefit allowance amounts are outlined in the respective bargaining unit MOU or Salary Resolution.

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What if I don't agree with the designated eligible and excluded items for Emergency Preparedness?

The eligible and excluded items were developed by several departments including the Department of Emergency Management, Office of Recovery and Resiliency, and Human Resources. Denied claims under Emergency Preparedness will be evaluated periodically to assess if changes are necessary.

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