



HRDF Manual

HRS FINANCE

HRS ORGANIZATIONAL HEALTH AND EFFECTIVENESS

Updated March 2019

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1. Overview

1.1 What Is HRDF?

The University of Alberta is committed to learning and development for support staff. As part of this commitment, the Human Resources Development Fund (HRDF) has been established as a negotiated benefit between the University of Alberta and the Non-Academic Staff Association (NASA). HRDF is intended as a mutual benefit to both support staff and the University itself.

The purpose of HRDF is to help employees to access learning opportunities (courses, workshops, seminars, in-school apprenticeship training or programs) that will:

- Enhance your capacity to perform work
- Prepare for an expanded or different role

The annual fund of four hundred thousand dollars (\$400,000) is renewed at the beginning of each fiscal year, April 1 - March 31, and is subject to review.

1.2 Who Is Eligible?

Both Operating and Trust support staff are eligible to apply for HRDF, according to the following table. If you are unsure what employee type you are, contact your HR coordinator or APO.

Employee Type	Eligibility	Timing	Maximum Entitlement
Casual 1	No	Not applicable	None
Casual 2	Yes	When Casual 2 starts	\$500 per fiscal year*
Auxiliary	Yes	When Auxiliary starts	\$750 per fiscal year*
Regular	Yes	When Regular starts	\$750 per fiscal year
Excluded Employees	No	Not applicable	Not applicable

* Not eligible for borrowed funds from future years.

If you move from one employee type to another (e.g. through promotion), your maximum entitlement for that fiscal year is the maximum entitlement for your new position. Entitlements are not pro-rated, but any HRDF funds used prior to promotion will count towards your yearly maximum.

For more information about eligibility, please refer to the Operating Agreement (Part A) Article 25, Trust Agreement (Part B) Article 15. English as Second Language (ESL) staff should refer to ESL Agreement (Part C) Article 19 to determine if they are eligible. Support staff members in positions excluded from the bargaining unit are not eligible for HRDF.

2. HRDF Guidelines

2.1 How to Apply for Funding

To apply for HRDF funding, you need to complete the application form within the E-HRDF system (<https://apps.hrs.ualberta.ca/HRDFOnline>). If you need additional information, please contact the HRDF Office by email at HRDF@ualberta.ca or by phone at 780-492-4350.

A separate application must be completed **for each** course, workshop, seminar, or conference prior to the start of the event. Your application should include all the costs for the event including anticipated travel/accommodation costs (see Section 2.7 for further detail). Once your application is submitted it will be reviewed for the following information:

- Employee type, eligibility, and employee number
- Funding entitlement or remaining entitlement if funds have been previously accessed
- Training request meets the criteria set out in the Collective Agreement

In order to allow time for your application to be processed, you should submit the application form **at least 1 month prior** to the beginning of the course. The E-HRDF system will notify you when the application has been submitted and again when it has been processed.

You are responsible for registering yourself in the course. Your HRDF application does not constitute registration in a course- it is only a method of payment. Please note that there are two options for payment depending on the course provider:

- Either you or your department must pay the up-front costs to the course provider. Keep all receipts, as you will need these for reimbursement later.
- If the course is offered through the Technology Training Centre (TTC), the Faculty of Extension or Organizational Development, Equity and Health (ODEH) an invoice will be sent directly from these units to HRDF. You only need to let the course provider (TTC, Extension or ODEH) know you are approved for HRDF. No receipts need to be submitted on your part in this case.

There is no limit on the number of courses you may take each year, but once you reach your maximum entitlement for the fiscal year, you cannot request funding again until the next fiscal year.

HRDF is administered on a first come, first served basis. Once HRDF funds are depleted, a notice will be posted on the Human Resource Services website at <http://www.hrs.ualberta.ca/HRDF.aspx>. The eHRDF system will notify employees that there are no funds available for a period at the time of submission and as such all new applications will be declined until the following period opens. Therefore, depending on the status of the fund, eligible employees may not be able to access funding at that time.

2.2 When to Apply for Funding

For courses/conferences which start between:	Applications will be accepted beginning:
April 1-June 30	March 1*
July 1 – September 30	June 1*
October 1- December 31	September 1*
January 1-March 31	December 1*

* Applications are accepted beginning at 8:00 AM on the opening day of the applications, unless the opening day falls on a weekend or holiday. If the application opening date is on a weekend or holiday, the applications will open at 8:00 AM on the next business day. E-HRDF will not process any applications prior to the opening date for each period.

2.3 Courses that Will Be Funded

HRDF will cover courses or training that enhance your skills in your current job. Courses and training that are required for your job are not eligible for HRDF and should be covered by your department. HRDF will fund course fees, course materials, in-course examination fees, and where applicable, reasonable out of town expenses for travel, meals, and accommodation to a maximum of 50%.

The following types of courses are generally funded:

Job Enhancement

- Conferences, seminars or workshops
- Supervisory courses and seminars
- Core competency development including: Communication and interpersonal skills
- Technology and office organizational skills
- Language courses (e.g. French, English, Spanish)
- First Aid and CPR courses (Only the initial certification will be funded)
- Materials, books or supplies required for an approved course (This does **not** include large equipment items such as computer hardware)
- High School upgrading
- Self-paced online or correspondence courses, under certain conditions. See FAQs for more information.

Funding approvals are subject to audit, revision and may be reversed to ensure the appropriate use of the fund.

2.4 Courses that Will Not Be Funded

Courses that are required for you to perform day-to-day work activities are not eligible for HRDF. Faculties and departments are encouraged to assist in the professional development of their employees by providing the courses and upgrading of skills required to perform day-to-day duties.

The following types of courses/expenses will NOT be funded by HRDF:

- Wellness courses
- General interest courses (e.g. hobbies, crafts, recreational memberships)
- Job-specific training required for the eligible employee's current role
- Training required by legislation for the eligible employee's current role
- University of Alberta credit courses and any associated costs, e.g. books (Tuition remission for credit courses is available for some employees. For details, see <http://www.hrs.ualberta.ca/Learning/Funding/TuitionRemission.aspx>.)
- Miscellaneous expenses like parking or lunch expenses while attending courses within Edmonton
- Certification exams or preparation/entrance exams
- Re-certification course expenses are not covered. If a specific eligible employee has been designated as the faculty/department representative, the department will be responsible for the funding
- Professional association/membership fees
- Large equipment items such as computer hardware
- Books and materials required for courses for which Tuition Remission has been granted
- Books, material or supplies for courses that HRDF did not approve

2.5 Borrowed Funding

If you require funding to take a program of study or attend a conference, the collective agreement makes provision for borrowed funds for eligible employees. A maximum of \$50,000 is allotted from the annual fund each year for borrowed applications.

If you are eligible for borrowed funding you may request to use your HRDF amount for the current fiscal and the next fiscal year to a maximum of \$1500. Courses/events covered under borrowed funding are:

- a) A specific program of studies offered by an approved post-secondary institution where the program is part of a long-term learning plan that in the judgment of both you and your supervisor meets the criteria outlined in the Collective Agreement. Where the identical program of studies is available at the University of Alberta, you will access the program locally. If funding for the program is approved, you are required to submit receipts for each course that you take in order to be reimbursed.

- b) Attendance at a major international conference that, in the judgment of you and your supervisor, is of mutual benefit to you and your department.

Where such program or conference is approved, you will not be allowed to apply for funding in the next fiscal year. If you have not submitted an application to use the approved funds within six months, your application will be reviewed.

Example: An eligible employee may apply for up to \$1,500 to attend a certificate program. The eligible employee may be granted up to \$750 for the current fiscal year and up to \$750 the following fiscal year. In this case, the eligible employee may not apply for funding again until **the two year period is complete**. This includes eligible employees who did not use the entire \$1,500.

2.6 Reimbursements

Once you are approved for HRDF, you or your department must pay for the course and request reimbursement from the Fund. The only exception is for any courses offered by the Technology Training Centre (TTC), Organizational Development, Equity and Health (ODEH) or the Faculty of Extension, which can invoice HRDF directly.

Expenses Paid by the Employee

Submit **original** receipts to the HRDF office. Electronic receipts must be printed and submitted. Keep a copy of all receipts for your records.

Clearly write your HRDF application number on the back of your receipts. The application number is generated by the E-HRDF system when you submit your application. Submit original receipts to the HRDF office at 2-60 University Terrace. The HRDF office **must** receive receipts within **45 calendar days** of the course end date in order for you to receive reimbursement. This deadline is strictly enforced. After this date, the previously approved funds will be made available to other applicants.

Reimbursements to the employee are done through the payroll system. Receipts received and processed by the HRDF office prior to pay-period cut off will be reimbursed on the following pay cheque. To view the pay-period administration calendars refer to this website: <http://www.hrs.ualberta.ca/en/HiringandManaging/PayAdmin.aspx>.

HRDF is unable to reimburse third parties.

Expenses Paid by the Department

The Department submits a copy of their ledger to the HRDF office. Funds will then be returned to the Department via a journal entry to the speed code provided on the application. Employees are encouraged to remind their Department about the 45-day time limit for submitting ledger lines.

2.7 Travel and Accommodation Claims

If you are attending a conference or workshop that involves any related travel costs (ie. Airfare, vehicle rental, parking, mileage and/or accommodation expenses), HRDF cannot reimburse you directly as it cannot process travel claims. Your department must pay for travel costs up front, or you must pay the costs and process your travel expense reimbursement claim using the PeopleSoft financial system. The department then submits a copy of their ledger to the HRDF office for reimbursement. Please note that all travel and accommodation claims will only be reimbursed up to 50% of the total amount expended.

2.8 Cancellation of Courses

If funding for your course has been approved and your course is subsequently cancelled, please notify the HRDF office. Also, notify the HRDF office if the course start date has been changed or if you withdraw from the course.

If you cancel, fail to attend, or do not complete an approved course without legitimate reasons, you will be fully responsible to reimburse the Fund for the full amount that was dispersed to you for the course.

3. Using the E-HRDF System

3.1 Summary of Application Procedure

Complete the HRDF application form within the E-HRDF system and click the Submit button.

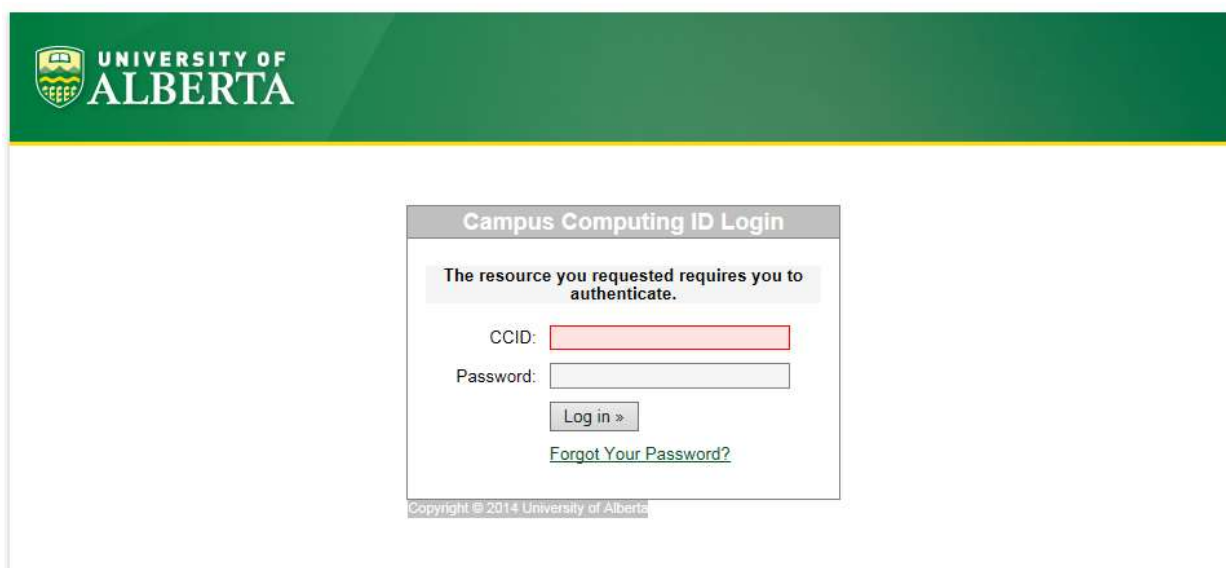
Once you receive HRDF approval, register in the course. Registration is the employee's responsibility. If you register prior to receiving approval, you will be responsible for course costs or cancellation fees if the course is not subsequently approved.

If you make any changes to your plans (i.e., re-schedule, cannot attend, did not complete, etc.) please notify the HRDF office.

3.2 E-HRDF Instructions for Applicants

Access E-HRDF at: <https://apps.hrs.ualberta.ca/HRDFOnline/Employee>

You will see the following screen where you can log-in using your CCID and password:



In the left menu, click on **New Application** to display the HRDF application form.

- Dashboard
- New Application**
- New Borrowed Application
- New Message
- Logout

Once “New application” has been selected, the following entry screen will appear:

The screenshot shows the HRDF application form with the following fields and sections:

- Course/Conference Title ***: Text input field.
- Course/Conference Offered By ***: Dropdown menu.
- Department required training?
- Available Application:** Section with a date range: *Between 2015-07-01 and 2015-09-30*.
- Start Date ***: Text input field.
- End Date ***: Text input field.
- Length ***: Dropdown menu (selected: 4 hrs).
- Type ***: Dropdown menu (selected: In Town Conference).
- Mode ***: Dropdown menu (selected: Distance (e-learning)).
- Course/Conference Benefit ***: Text input field.
- Time Off Required?**:
- Payment Options ***: Dropdown menu (selected: Employee Pay).
- Table:**

	Requested Amount	Coverage	HRDF Amount
Course/Conference	<input type="text" value="0"/>	100	0
Book/Material	<input type="text" value="0"/>	100	0
Travel/Accommodation	<input type="text" value="0"/>	50	0

Buttons at the bottom: **Save as Draft**, **Submit Application**, **Cancel Application**.

Course Title

Enter the full title of the course. If you are applying for funding for multiple courses, complete a separate HRDF application for each course.

Offered By

Select the name of the institution or organization that is offering the course from the drop-down list. The drop-down list has common providers in alphabetical order.

If you do not see your provider in the list select “Other”. At that point a text box will pop-up for you to type in the provider name - enter the complete name; please do not abbreviate. If the course is a credit course, for which there is an equivalent course at the U of A, the course cannot be approved unless reasons are given for enrolling in the course at another institution. There will also be a box to enter the Location of the course. Please include the country if outside Canada.



The form for the 'Offered By' section includes the following fields:

- Course/Conference Title *
- Course/Conference Offered By * (dropdown menu with 'Other' selected)
- Department required training? (checkbox)
- Institution Name * (text box)
- Institution Address * (text box)

Start Date and End Date

Enter the start and end date for the course. For single-day courses, enter the same date in both fields. If the course has continuous enrollment or is self-paced, enter the dates that you expect to start and end the course. The end date must be in the same fiscal year. The fiscal year runs from April 1 to March 31.



The form for the 'Start Date and End Date' section includes the following fields:

- Available Application: * Between: 2015.07.01 and 2015.09.30
- Start Date *
- End Date *
- Length * (dropdown menu with '<4 hrs' selected)
- Type * (dropdown menu with 'In Town Conference' selected)
- Mode * (dropdown menu with 'Distance (e-learning)' selected)
- Course/Conference Benefit *

Type

Select the type of learning opportunity this application is for by using the drop-down menu options.



The form for the 'Type' section includes the following fields:

- Available Application: * Between: 2015.07.01 and 2015.09.30
- Start Date *
- End Date *
- Length * (dropdown menu with '<4 hrs' selected)
- Type * (dropdown menu with 'In Town Conference' selected)
- Mode * (dropdown menu with 'Distance (e-learning)' selected)
- Course/Conference Benefit *

Mode

Select the mode of delivery the learning opportunity takes by using the drop-down menu options



The screenshot shows a form with the following fields: Available Application: (Between: 2015.07.01 and 2015.09.30), Start Date *, End Date *, Length *, Type *, Mode *, and Course/Conference Benefit *. The Mode dropdown menu is open, showing three options: <4 hrs, In Town Conference, and Distance (e-learning).

Length

Select the length of time the learning opportunity will take by using the drop-down menu options.



The screenshot shows a form with the following fields: Available Application: (Between: 2015.07.01 and 2015.09.30), Start Date *, End Date *, Length *, Type *, Mode *, and Course/Conference Benefit *. The Length dropdown menu is open, showing three options: <4 hrs, In Town Conference, and Distance (e-learning).

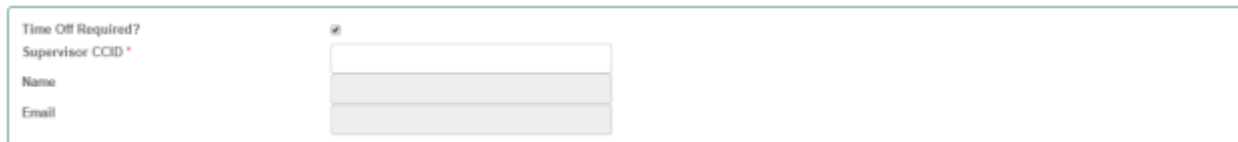
Time-Off Required

Time-off for learning opportunities must be approved by your supervisor/authorizer. It is strongly recommended that you hold a conversation with your supervisor before you apply for HRDF.



The screenshot shows a form with the following field: Time Off Required? (checkbox). The checkbox is currently unchecked.

If time off IS required, the system will require the CCID of your supervisor (or other authority) to obtain approval for the time-off. The system will then contact the time-off authorizer to confirm approval.



The screenshot shows a form with the following fields: Time Off Required? (checkbox), Supervisor CCID *, Name, and Email. The Time Off Required? checkbox is checked. The Supervisor CCID field is empty.

Department Required Training

Note that department required courses are not covered by HRDF. Click the Department required training box if the course is required training for your job. Employees, in collaboration with their supervisors, are encouraged to identify learning and development plans and potential learning

opportunities where the Fund may apply, as part of the ongoing performance management process. However, where the employer or legislation requires job specific training, the employer should cover the cost of such training.

Course/Conference Title *	<input type="text"/>	<input type="checkbox"/> Department required training?
Course/Conference Offered By *	Other <input type="text"/>	

Course Benefit

Enter an explanation of how this course is a benefit to both you and your employer. There is no restriction on the length of the course benefit explanation, but should typically be the length of a short paragraph. This section is a good place to talk about your learning plan, to capture how this activity is adding to your job, career and personal development.

Course/Conference Benefit *	<input type="text"/>
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Once the course detail fields are complete in the first section, you will notice a second section on the New Application page outlining the details of payment that looks like the below:

Payment Options *	Employee Pay <input type="text"/>		
	Requested Amount	Coverage	HRDF Amount
Course/Conference	<input type="text"/>	100	0
Book/Material	<input type="text"/>	100	0
Travel/Accommodation	<input type="text"/>	50	0

Course Expenses / Payment Options

For U of A courses, the employee must pay up front, except for Extension, Technology Training Centre (TTC) and Organizational Development, Equity and Health (ODEH) courses only. For these three providers, the invoice will be sent directly to the HRDF office by the course provider. Please note that registering for a course is not an application for HRDF funding, nor is an application for HRDF a registration in a course or program. An application for HRDF must still be submitted and approved, and the registration process will be completed separately.

For Off-Campus Providers, either the employee or the department will pay the course fees upfront and then seek reimbursement from HRDF. The department payment option is required if there are any travel expenses, and may also be used for other course expenses. If your department is paying, the system will require the CCID for your financial authority (Finance Officer, APO, Trust Holder, etc.), so they can be contacted to provide information and receive instructions for reimbursement.

Enter the amount and type of any eligible course expenses. Type is classified as either (1) Course/Application/Conference or (2) Materials, books or supplies. The form allows for up to three expenses per course. For additional expenses, complete a new application form.

Expenses covered include registration or course fees and reasonable travel expenses (if the course is outside of Edmonton). Travel expenses are considered up to 50% for courses that are not available locally.

HRDF does not cover the cost of books and materials required for courses for which Tuition Remission will be granted or has been granted. Books and materials are covered if they are for an approved course, but are not included in the cost of the course.

Authorization

If you have indicated on the form that you require time-off work or that your department will be paying for the learning opportunity, this portion of the form will appear and you will be required to fill in one or both sections as appropriate.

The screenshot shows two distinct form sections. The first section, titled 'Time Off Required?', contains a checkbox with a checkmark, a 'Supervisor CCID' field, and 'Name' and 'Email' fields. The second section, titled 'Payment Options', features a dropdown menu with 'Department Pay (This option is REQUIRED if there are any travel expenses)' selected, and 'Financial Auth CCID', 'Name', and 'Email' fields.

Authorization For Time Off Work

This section will appear only if you require time off work to attend the course and have checked the 'Time Off Required' box. Enter the CCID of the individual with the authority to approve your time off. The system will contact them via email to request that they confirm authorization of your time off work. The application will not be processed until the time off authority has provided the approval.

Authorization For Department Paying

This section will appear only if your department will pay the course fees upfront and then seek reimbursement from HRDF. Enter the CCID of the Financial Authority or Trust Holder to approve your expenses. The system will contact them via email to approve the expenses. The application will not be processed until the financial authority has provided the approval.

Save, Submit or Print Application

At the bottom of the application form click on **Save as Draft** if you would like to save the information you've entered thus far and continue working on it at another time. The HRDF office will not take any action on draft applications. Otherwise, if you are done filling in the form, click on the **Submit Application** button; your application will then be forwarded to any approvers (if applicable) and then considered by the HRDF office. You can also print your HRDF application by clicking on Print Application.

Save as Draft

Submit Application

Cancel Application

Print Application

Receipts

If your HRDF application is approved and after you have paid for the course, remember to submit the **original** receipts to the HRDF office at 2-60 University Terrace. Electronic receipts must be printed and submitted. Keep a copy of all receipts for your records. Receipts must have the **HRDF Application Number** (generated when you submit your E-HRDF application), your **Name** and **Employee ID** written on the back. The HRDF office must receive receipts within 45 days of the course end date to process the reimbursement. Reimbursements are issued on staff payroll.

Borrowed Funds

If you would like to use the Borrowed Funds option in conjunction with your HRDF application(s), as outlined in Section 2.5 of this manual, click on the **New Borrowed Application** link in the left-hand menu. Complete the reason for the borrowed funds request, course/conference provider and the borrowed amount in the appropriate fields.

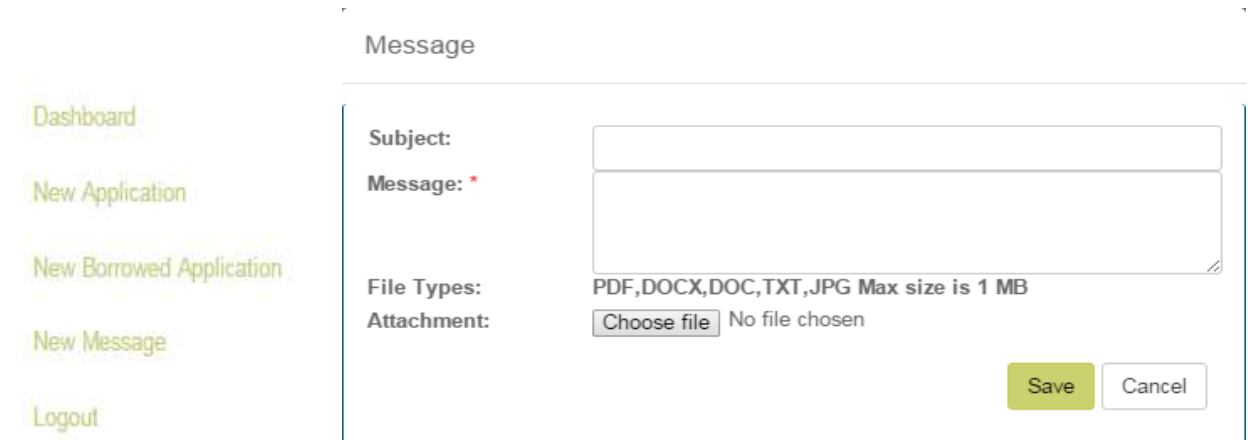
The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes links for Dashboard, New Application, New Borrowed Application, New Message, and Logout. The main content area is titled 'Borrowed Funds' and contains a form with the following fields:

- Available Borrowed Application Period * (Dropdown menu showing 'From: 2015-04-01 To: 2017-03-31')
- Borrowed Reason * (Dropdown menu showing 'Full Conference Course')
- Course/Conference Offered By * (Dropdown menu showing '--')
- Borrowed Amount: * (Text input field containing '0')
- Note (Text area)

A green 'Submit' button is located at the bottom right of the form.

Send Message

If you have questions or comments about your HRDF application, you may click on **Send Message** to send a note to the HRDF Administrative Office. A window will appear where you type in a Subject and Message text as shown below. Note that this is an internal message within the E-HRDF system; it is not sent via standard email. This is a better tracking mechanism for the HRDF Office; it ensures that your inquiries are kept with your overall HRDF file, with all of your applications, messages and other history in one place.

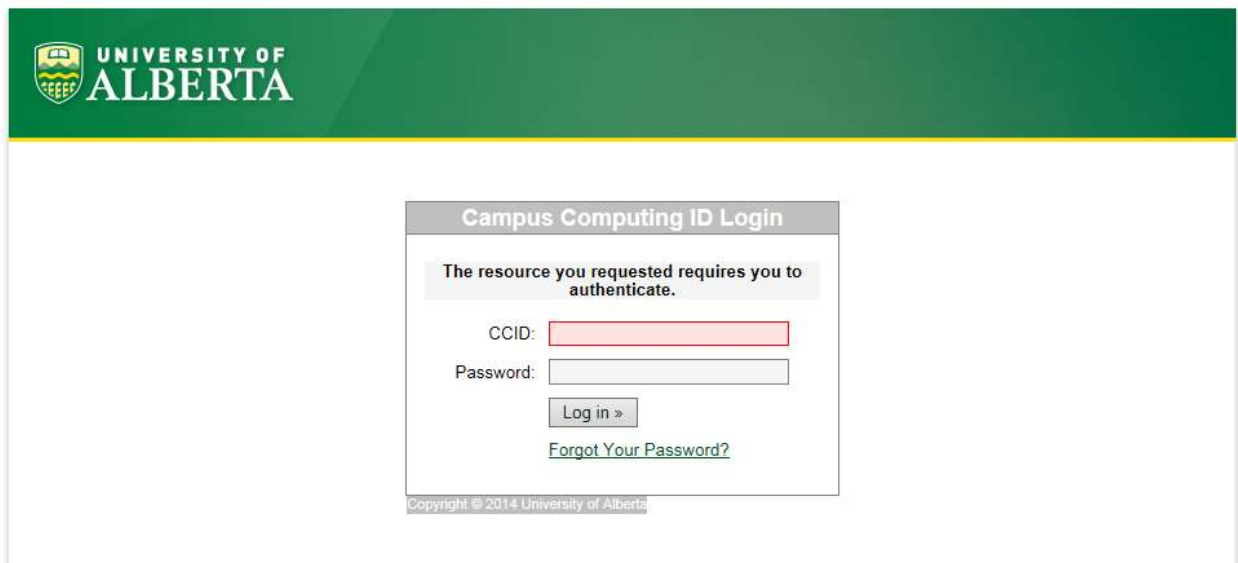


The screenshot shows a web interface for sending a message. On the left is a navigation menu with links: Dashboard, New Application, New Borrowed Application, New Message, and Logout. The main area is titled 'Message' and contains a form with the following fields and controls:

- Subject:** A text input field.
- Message:** A larger text area for the message content, marked with a red asterisk.
- File Types:** A label indicating supported file formats: PDF, DOCX, DOC, TXT, JPG. A note states 'Max size is 1 MB'.
- Attachment:** A 'Choose file' button and the text 'No file chosen'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

3.3 E-HRDF for Approvers

Individuals listed as approvers on an E-HRDF application will receive an email notification requesting that they log-in to E-HRDF to confirm their authorization (for Time Off or Department Payment). If you are requested to do an approval, you will access E-HRDF and log in with your CCID and password, just as with applicants, at: <https://apps.hrs.ualberta.ca/HRDFOnline/Approver>.



The screenshot shows the 'Campus Computing ID Login' page for the University of Alberta. The page features the university's logo and name at the top. The main content area contains a login form with the following elements:

- Header:** 'Campus Computing ID Login'.
- Message:** 'The resource you requested requires you to authenticate.'
- Fields:** 'CCID:' and 'Password:' labels followed by input fields.
- Buttons:** 'Log in »' button.
- Link:** 'Forgot Your Password?' link.
- Footer:** 'Copyright © 2014 University of Alberta'.

The Approver home page shows a list of new applications awaiting your approval, as shown below:

HRDF Administration

Waiting to approve application list

ID	Application Title	Employee ID	Employee Name	Start Date	Applied Amount	Status	Time Off Approve Status	Payment Approve Status
201004	Dual 2016	12000-01	Ram Dassanapala	2016-04-18	\$475.00	Pending	Request Approval	Request Approval
201002	Conference	1400286	Jackelyn Maam Gels	2015-12-12	\$1,000.00	Cancelled	Declined	Declined
201001	Microsoft Conference in California 2016	1400286	Jackelyn Maam Gels	2015-12-12	\$1,000.00	Declined	Approved	Approved
201003	Microsoft Conference 2016	1400286	Jackelyn Maam Gels	2015-12-10	\$1,000.00	Draft	Request Approval	Request Approval
201004	xxx	0010639	Barbara Collins	2015-09-25	\$200.00	Resubmit	Request Approval	Request Approval
201006	Organizational Behavior	005737	Carmen Grant	2015-07-22	\$100.00	Cancelled	Approved	N/A
201005	ABC Conference	005737	Carmen Grant	2015-05-01	\$350.00	Cancelled	Approved	Approved
201005	ABC	005737	Carmen Grant	2015-06-23	\$670.00	Declined	N/A	Approved

Click on the link under **ID** to view the HRDF application and approval details. You will see information about the employee and requested course (title, dates, cost, etc.) followed by the Authorization details that require your attention.

If you are the employee’s supervisor or time off authorizer, you will see the following drop-down list:

By selecting approve or decline you agree that in your position you have supervisory authorization for time-off.

Time Off Approval Request: *

If you approve the employee’s time off, select **Approved** from the drop-down menu and click **Submit**. Once you have submitted your approval you will see the following pop-up message.

Message

Update successful

If you are the department financial authorization, you will see the following drop-down list:

By selecting approve or decline you agree that in your position you have financial authorization for department payment.

Payment Approval Request: *

If you approve the employee's expenses select **Approved**, enter the department speed code for the HRDF reimbursement and click **Submit**. Once you have submitted your approval you will see the following pop-up message.

Message

Update successful

Close

3.4 E-HRDF Help

If you have any questions about HRDF check the FAQs in the next section of this manual (3.5) or you may contact the **HRDF Administrative Office**:

- Telephone: 492-4350
- Email: HRDF@hrs.ualberta.ca
- Campus Mail: 2-60 University Terrace

HRDF Resources:

- HRDF Information (public website):
<http://www.hrs.ualberta.ca/Learning/Funding/HRDF.aspx>
- E-HRDF website (requires CCID log-in):
<https://apps.hrs.ualberta.ca/HRDFOnline>
- HRDF Manual (PDF):
<http://www.hrs.ualberta.ca/Forms/HRDF-Manual.pdf>
- HRDF printable application form:
<http://www.hrs.ualberta.ca/Forms/HRDF-Application.pdf>

Collective Agreements information on HRDF:

- Operating Agreement (Part A) Article 25:
<http://www.hrs.ualberta.ca/docs/HR/Agreements/Support/Operating/Article25.pdf>

- Operating Agreement (Common Provisions) Appendix G:
<http://www.hrs.ualberta.ca/MyEmployment/~ /media/hrs/MyEmployment/Agreements/Support/Common.pdf>
- Trust Agreement (Part B) Article 15:
<http://www.hrs.ualberta.ca/docs/HR/Agreements/Support/Trust/Article15.pdf>
- ESL Agreement (Part C) Article 19:
<http://www.hrs.ualberta.ca/docs/HR/Agreements/Support/ESL/Article19.pdf>

3.5 E-HRDF FAQs

Below are answers to frequently asked questions about E-HRDF:

Q1: Applications are approved on a first-come, first-served basis. So when is an E-HRDF application considered received - when submitted by the employee or, if applicable, when all the approvals are received?

Answer: The application is received only when it is complete with the appropriate approvals, if needed. Much the same as with the paper version, an incomplete application cannot be approved. The first-come, first served approvals will be completed as complete applications are received. If you are concerned about an approver being away, it would be appropriate for that approving authority to be delegated in their absence, and the employee can change the approver to accommodate that after they have submitted their application (contact the HRDF office to do so). Employees and indicated approvers will receive reminders about the status of the application, and the employee can also follow-up personally with regards to getting the approvals done in a timely manner. Ideally, the employee would have had a conversation with an approver before submitting the application, so that the approver is aware of their authorization requirements.

Q2: Can an employee still access HRDF when on Maternity Leave?

Answer: The HRDF is available to support staff employees. If a person is on an authorized leave of absence, they are still employees, though they are away from work for a legitimate reason. They are still eligible to apply for HRDF and take training. Similarly, if an employee has applied for a course and been approved for HRDF funding and their position at the University is terminated, they have a window in which they may still attend that training. Employees in this situation should ask their HR partner or union representative if this applies to them.

Q3: Can employees from certain departments have authorized approvers and/or financial approvers automatically populated on their applications?

Answer: This EHRDF system is meant to be a tool that is available to all employees. We are not prepared to re-write portions of the system to accommodate particular unit needs. The communication process of identifying authorized approvers for departments is an internal one.

Due to the amount of mobility for affected staff and changes in positions, the amount of work needed to keep the system up-to-date would negate the benefits of the stream-lined system.

Q4: Do the emails received when the application is approved include the 45 day warning for receipts?

Answer: The 45-day warning to submit receipts will be in several places along the application process, in addition to reminders the employee will receive. The employee will ultimately be responsible for heeding the submission period.

Q5: I attended a course provided by TTC, Extension or ODEH. Why am I received a reminder to submit my receipts?

Answer: The warning reminders for receipts are automatic, and all employees whose courses have ended will receive the warning unless the HRDF office has received the receipts or been invoiced by the internal course providers (TTC, ODEH and Extension only). You do not need to send receipts in this case. Please contact the course provider to ask that they invoice HRDF directly.

Q6: I want to take a self-paced course. Can I apply for HRDF?

Answer: Self-paced online or correspondence courses are increasingly common and convenient ways to access development. The HRDF will fund self-paced courses if the application is received indicating that the course will be taken during the appropriate funding period. For example, if you want to take an online course beginning in May, you must apply for HRDF funding for the April 1 – June 30 funding period that opens March 1. If you pay for the course prior to obtaining HRDF funding, and cannot prove that the course will start in the proper funding period, the application will be declined.

Q7: I enrolled in a course, and indicated I would use HRDF funding, but now there is no more HRDF funding. What should I do?

Answer: You must decide if you can pay for the course yourself, use your Personal Spending Account (part of your employee benefits, if applicable), or withdraw from the course. It is best to apply for funding prior to completing your registration, to ensure that you will be able to pay for the course.

4. Additional Information for Managers, Administrators, etc.

This section contains additional information for supervisors, managers, APOs, departmental financial staff, human resources coordinators, and other administrators.

4.1 Administrative Roles

Supervisors and Managers

If an employee plans to take a course that takes place during paid work hours, they should discuss their plans with you prior to applying for HRDF. You have several options for responding to such a request:

- Allow the employee to take the course as regular paid work time
- Approve the absence but make arrangements for the employee to make up the time spent away from work
- Allow the employee to use vacation or lieu time
- Allow the employee to take a leave of absence
- Decline the request

If you approve one of the first two options above, the employee indicates on the HRDF application form that the course is during work hours. They will be asked to enter your CCID so the system can contact you. You will receive an email from the E-HRDF system prompting you to log in using your CCID, then confirm that you approve of the employee's time away from work. You should indicate your approval as soon as you are able to, as the employee's HRDF application cannot be processed until you do, and a delayed application risks being declined if the fund has been depleted for that period.

HRDF does **not** require supervisor approval for courses taken outside of work hours, during vacation or lieu time, during a leave of absence, or any other non-work hours.

Departmental Finance Staff

Your department may opt to pay for an employee's course expenses upfront and obtain reimbursement from the HRDF office. This option is required for courses requiring out-of-town travel expenses (HRDF cannot process travel claims), and may be used for local courses also.

For courses requiring travel: the department must either pay the expenses directly or have the employee pay expenses and then submit a travel claim and be reimbursed by the department.

For all courses where the department is paying the expenses: the employee still applies for HRDF funding as usual, and indicates on the application form that the department is paying. They will need to provide the CCID of the financial authority who will later arrange reimbursement for the department. This may be a dedicated finance person, APO, trustholder, etc.

If you are the person indicated by the employee, you will receive an email from the E-HRDF system prompting you to log in using your CCID, to confirm that the department is paying for the course. The system will also ask for the speed code that the reimbursement should be made to and provide you with the HRDF application information.

For reimbursement, send a printout or copy of the journal ledger to the HRDF office (2-60 University Terrace). The ledger must have the **HRDF application number** written on the back. The ledger must be received by the HRDF office within **45 calendar days** of the end of the course for reimbursement to be made. This deadline is strictly enforced. If you are unable to meet this deadline for any reason, please contact the HRDF office by email at HRDF@hrs.ualberta.ca or by phone at 492-4350. Reimbursement will be made via journal voucher.