

Human Resource Development Fund (HRDF) User Guide

Instructional Guidelines

2024

Prepared by:

SHARED SERVICES

Compliance Services Team

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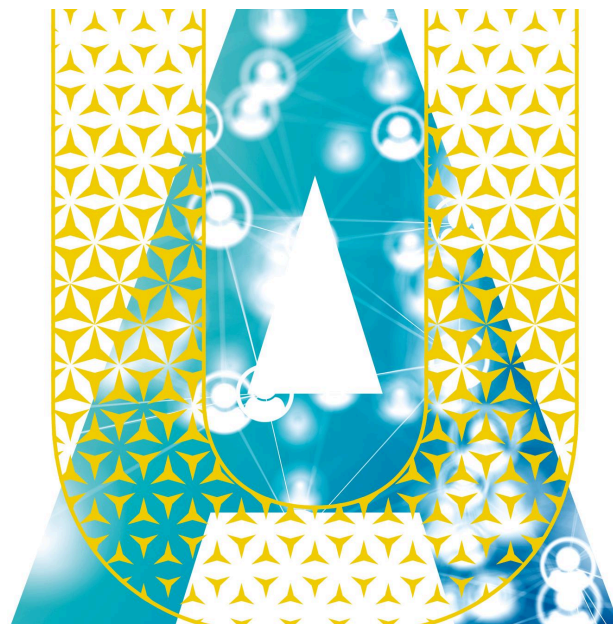


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Overview

The purpose of this user guide is to provide step by step instructions on how to submit an application to request HRDF funds through the HRDF application system known as E-HRDF.

This user guide is intended for NASA support staff.

Resources, Questions, Need Help?

[Human Resource Development Fund for Support Staff](#)

Contact: hrdf@ualberta.ca

HRDF Fund Availability

HRDF is administered on a first come, first serve basis. Once HRDF funds are depleted, a notice will be posted on the [HRDF website](#).

The E-HRDF 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.

Course Eligibility

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 and course materials.

Where applicable, reasonable out of town expenses for travel, meals, and accommodation to a maximum of 50% can be covered only if at least 50% of the registration fee is funded through HRDF. If there is no registration fee, travel expenses are not eligible through HRDF.

Courses that are required for you to perform day-to-day activities are not eligible for HRDF.

The table below outlines the courses that meet the eligibility for HRDF funding.

Eligible Courses	Ineligible Courses
<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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

<ul style="list-style-type: none"> • 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 • Online learning (Single online courses or long-term program of study). 	<p>associated costs, e.g. books (Tuition remission for credit courses is available for some employees.</p> <ul style="list-style-type: none"> • 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
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Borrowed Funding Course Eligibility

If you are eligible for borrowed funding you may request to use your entitlement for the current fiscal and the next fiscal year to a maximum of \$1500.

Courses/events covered under borrowed funding are:

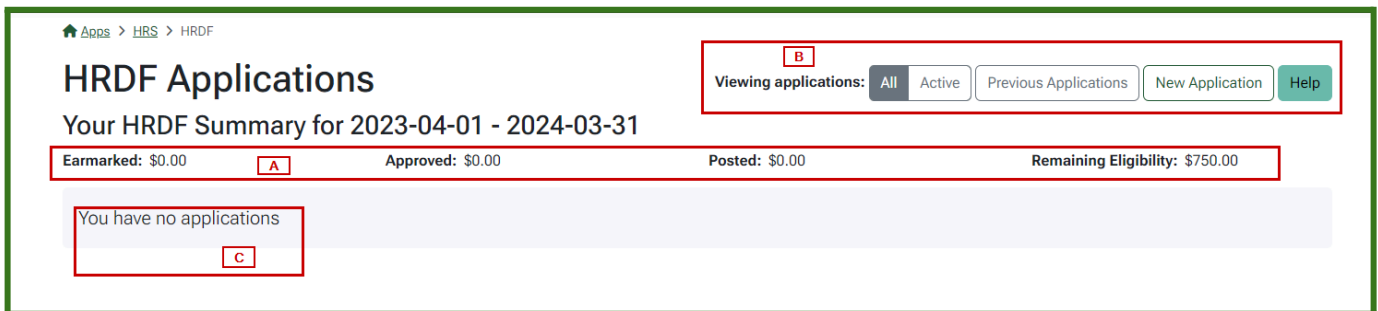
- A specific program of studies offered by an approved post-secondary institution where the program is part of a long-term learning plan that, in the judgement of both you and your supervisor, meets the criteria outlined in the Collective Agreement. Where the identical program of studies is available 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.
- Attendance at a major international conference that, in the judgement 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.

Note: If applying for a program of study, you will list it as one application with all of the associated courses, and enter start / end dates that encompass all of the courses. Once all courses are complete you can submit all of the receipts for reimbursement.

Access and Navigation

1. To access the HRDF application, [click here](#) using your CCID and password
2. The below **Home Page** is the applicant portal and will provide you with the following information:
 - A. Current **HRDF Summary** for the current year
 - i. This section displays the calculated eligibility amount, how much of your eligible funding has been used and remaining eligible HRDF balance.
 - B. Displays all of the application statuses:
 - i. **Active:** this section displays rows of Submitted/Active applications records submitted by the user.
 - ii. **Previous Applications:** the section displays rows of Posted or Cancelled application records submitted by the user
 - iii. **New Application:** this section allows for the creation of a new application up to the current eligible amount for the applicant.
 - C. Displays all the applications submitted to HRDF and their status



The screenshot shows the 'HRDF Applications' home page. At the top, there is a breadcrumb trail: 'Apps > HRS > HRDF'. The main heading is 'HRDF Applications'. Below it, the text reads 'Your HRDF Summary for 2023-04-01 - 2024-03-31'. A summary bar displays four metrics: 'Earmarked: \$0.00', 'Approved: \$0.00', 'Posted: \$0.00', and 'Remaining Eligibility: \$750.00'. To the right of the heading, there is a 'Viewing applications:' section with buttons for 'All', 'Active', 'Previous Applications', 'New Application', and 'Help'. Below the summary bar, a message states 'You have no applications'.

Apps > HRS > HRDF

HRDF Applications

Your HRDF Summary for 2023-04-01 - 2024-03-31

Earmarked: \$0.00 Approved: \$0.00 Posted: \$0.00 Remaining Eligibility: \$750.00

You have no applications

Applying for HRDF Funding

Before you begin the application process please ensure you have the following information:

- Review the eligibility for HRDF: [Human Resource Development Fund for Support Staff](#)
- Details of course you are applying for
- Speed code from the department (if the department is paying for some of the course and related expenses)
- Confirmation email from your supervisor approving time off for the course
- Receipts for expenses or registration (if available)

Important Notes:

- Any fields marked with an **asterisk*** are required and the application cannot be submitted without entering the data in the required fields.
- **Your HRDF application is for funding of the course, materials, and travel ONLY.** It does not constitute registration in a course. You are responsible for registering yourself in the course.
- A separate application must be completed for each course, workshop, seminar, or conference prior to the start of the event.
- 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.
- Submit your application 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.

1. Submit a new Application

- a. Log into the application portal using your CCID and password
- b. On the home page, click on the *New Application*.

The screenshot shows the 'HRDF Applications' page. At the top, there is a breadcrumb trail: 'Apps > HRS > HRDF'. The main heading is 'HRDF Applications'. Below it, the text reads 'Your HRDF Summary for 2023-04-01 - 2024-03-31'. On the left, there are three status indicators: 'Earmarked: \$0.00', 'Approved: \$0.00', and 'Posted: \$0.00'. On the right, there is a 'Remaining Eligibility: \$750.00'. A navigation bar at the top right contains buttons for 'Viewing applications:' (with sub-buttons 'All', 'Active', 'Previous Applications', and 'New Application'), and a 'Help' button. The 'New Application' button is highlighted with a red box. Below this bar, a red-bordered box contains the text 'Click here to submit a new application'. At the bottom of the page, a light blue box states 'You have no applications'.

2. Completing the Application

- a. **Start and End Date:** Enter the start date and end date that corresponds with the dates of your course. The start date must be on or after the application submission date.
- b. **Time off required and granted: Must be checked off** to trigger email notification to your supervisor to confirm approval for time off required to attend course
- c. **Course/Conference Title:** Provide the full name of the course or conference ([course eligibility](#))
- d. **Course/Conference Benefit:** Describe the expected benefits of attending the course
- e. **Learning Provider:** Select one of the following learning providers. If the provider is not listed, select Other and provide the name in the box below
- f. **Borrowed:** check this box if you are borrowing funds. The maximum amount that can be borrowed is \$1500 (\$750 for current year and \$750 for next fiscal year). This box cannot be checked if you have already used funds for the current fiscal year
 - i. If you are eligible for borrowed funding you may request to use your entitlement for the current fiscal and the next fiscal year to a maximum of \$1500. Refer to [Course Eligibility](#) for details on borrowed funding
- g. **Program of Study:** This must be completed if the borrowed box is checked off.
- h. **Paid by:** This identifies who is paying for the course/conference.
 - i. **Applicant:** You will pay for the course and receive reimbursement through HRDF
 - ii. **Department:** If your department is paying and this box is selected you will be required to provide a speed code.
 - iii. **U of A Course Provider:** Select this option if the U of A course provider will directly charge HRDF.
- i. **HRDF Amount (Course/Conference, Book/Material, Travel/Accommodation):**
 - i. In this section, list the known or expected expenses associated with the course and categorize them as course fee expenses, any books or materials required or purchased, or anticipated travel and accommodation costs.
 - ii. **Note:** 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.
 - iii. Travel expenses will only be reimbursed up to 50% if at least 50% of the registration fee has been funded through HRDF. If there is no registration fee, travel expenses are not eligible through HRDF.
- j. **Total Requested Amount:** Must not exceed the eligible amount or remaining in HRDF
- k. **Save:** Once the application is complete, click this button to submit the application for review by Shared Services.
 - i. **Note:** You will not be able to return to update or correct your application.

HRDF Create Application

Fiscal Period 2023-07-01 to 2023-09-30

Start Date

2023-09-12

End Date

2023-09-30

☐ Time off required and granted
 ☐ Borrowed

Program Of Study

This field is required if you are borrowing funds.

Course/Conference Title

Course/Conference Benefit

Learning Provider

Paid by

Applicant

Department

UofA Course Provider

	Requested Amount	Coverage %	HRDF Amount
Course/Conference	0.00	100	0.00
Book/Material	0.00	100	0.00
Travel/Accommodation	0.00	50	0.00
Total Requested Amount			0.00

Save will submit the application

Save

< Back

Total Requested amount must not exceed the maximum eligible amount of \$750

3. Application Review

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

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

Your application has been successfully submitted.

Apps > HRS > HRDF

HRDF Applications

Viewing applications:

All

Active

Previous Applications

New Application

Help

Your HRDF Summary for 2023-04-01 - 2024-03-31

Earmarked: \$700.00

Approved: \$0.00

Posted: \$0.00

Remaining Eligibility: \$50.00

Application No	Name	Course/Conference Title	Start Date	End Date	Status
000579	Emergency Capitalist (person)	Test	2023-09-21	2023-09-30	Submitted



Attaching Receipts

Once an application is submitted and approved you can click on the application number to view details of what was submitted.

Your application has been successfully submitted. ×

Apps > HRS > HRDF

HRDF Applications

Viewing applications: All Active Previous Applications New Application Help

Your HRDF Summary for 2023-04-01 - 2024-03-31

Earmarked: \$700.00 Click on Application number to view details Approved: \$0.00 Posted: \$0.00 Remaining Eligibility: \$50.00

Application No	Name	Course/Conference Title	Start Date	End Date	Status
000579	Emergency Response (person)	Test	2023-09-21	2023-09-30	Submitted

At this point, you have the ability to attach receipts or cancel the application (which will be covered in the next section).

Shared Services must receive receipts within 45 days of the course end date. Reimbursements will be issued through direct deposit on your semi-monthly pay cheque.

Note: Reminder notifications to submit receipts will be sent from the system. If receipts are not received within 45 calendar days of the course end date the funds will be returned to HRDF and made available to other applicants.

Upload Attachments

- Multiple file formats (PDF, PNG and JPEG) can be uploaded to the application
- File size is limited to 5MB
- Once all attachments are uploaded - click on "All receipts submitted"
- Attachments can be deleted or downloaded from the application

HRDF Application Details

All receipts submitted. ... Cancel Application ... < Back

Please note that all receipts must be submitted before 2023-11-14

Option to submit receipts or cancel application

Fiscal Period: 2023-07-01 to 2023-09-30
Application Id: 000381
Start Date: 2023-09-12
End Date: 2023-09-30
Date Submitted: 2023-09-11
Status: Approved
Program of Study:
Course/Conference Title: Training Course
Course/Conference Benefit: Will provide benefits
Learning Provider: NAIT
Course/Conference Amount: \$500.00
Book/Material Amount: \$200.00
Travel/Accommodation Amount: \$100.00
Total Requested Amount: \$750.00
Borrowed: ×
Paid by: Applicant

Amount (CAD)

There are no receipts attached.

Upload multiple attachments

Choose File No file chosen Upload

Cancelling the Application

If you do not wish to proceed with the application click on “cancel application”. This will delete the application that was submitted.

HRDF Application Details

All receipts submitted. ... Cancel Application ... < Back

Please note that all receipts must be submitted before 2023-11-14

Fiscal Period:
Application Id:
Start Date:
End Date:
Date Submitted:
Status:
Program of Study:
Course/Conference Title:
Course/Conference Benefit:
Learning Provider:
Course/Conference Amount:
Book/Material Amount:
Travel/Accommodation Amount:
Total Requested Amount:
Borrowed:
Paid by:

2023-07-01 to 2023-09-30
000381
2023-09-12
2023-09-30
2023-09-11
Approved
Training Course
Will provide benefits
NAIT
\$500.00
\$200.00
\$100.00
\$750.00
×
Applicant

Option to submit receipts or cancel application

Amount (CAD) 750.00

Choose File No file chosen Upload

There are no receipts attached.

Upload multiple attachments

Course changes: Please notify HRDF@ualberta.ca in the following instances:

- If funding for your course has been approved and your course is subsequently cancelled.
- If the course start date has been changed.
- If you withdraw from the course.

Note: If you cancel, fail to attend, or do not complete an approved course without legitimate reasons (at the discretion of Shared Services), you will be fully responsible to reimburse the Fund for the full amount that was dispersed to you for the course.

Frequently Asked Questions

Below are answers to frequently asked questions about HRDF

1. *Applications are approved on a first come, first served basis. So when is an E-HRDF application considered received?*

The application is received only when it is submitted for approval. The first-come, first-served approvals will be completed as applications are received. Ideally, the employee should have a conversation with their supervisor before submitting the application.

2. *Can an employee still access HRDF when on Maternity Leave?*

The HRDF is available to support staff employees. If a person is on an authorized leave of absence, they are still considered employees, and 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 confirm with their supervisor.

3. *Do the emails received when the application is approved include the 45 day warning for receipts?*

The 45 day notification to submit receipts will be visible on the employee portal once an application has been submitted and approved. In addition to the employee portal you will also receive regular reminder notifications during the 45 days period. You are ultimately responsible for submitting the receipts within the specified timeline.

4. *I received approval for a Continuing & Professional Education (CPE) or Organizational Development (OD) course and the payment option was U of A Course Provider. Am I responsible for any cancellation fees, if I do not attend or cancel my registration within the course provider timelines?*

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. This applies to all applications regardless of the payment option selected. U of A Course Provider payments are subject to this policy as well.

5. *I want to attend a course provided by the Technology Training Centre (TTC). Does this on-campus course provider allow direct invoicing to HRDF?*

The payment options for Technology Training Centre (TTC) courses are employee- or department-pay only. TTC no longer allows for direct invoicing to HRDF.

6. *I received approval on my borrowed application, what is my next step?*

If you are attending an international conference, the borrowed application is complete, once it is approved by Shared Services. Your department must pay for the 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 for reimbursement.

If taking a program of study all receipts will be submitted to the application and reimbursed together at the end of the program of study. Program of study must be completed within 1 year of starting

7. *I want to take an online learning course. Can I apply for HRDF?*

Online learning courses are increasingly common and convenient ways to access development. HRDF will fund online learning courses that are either single one-time pay as you go or a long-term program of study. For example, if you want to take an online course beginning in May, you must apply for HRDF funding for the April 1 to 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. HRDF will not reimburse any annual or short-term subscriptions to online learning providers.

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

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.

9. *Is it possible to transfer my approved funds to a different course?*

Approved funds are specific to the course or program for which the application was made. Funding is tied to the course, not the applicant. If an employee changes courses or programs, the funding cannot be transferred to a new course. Approval of the new application is dependent on the availability of funds. Applicants who submit receipts for different courses than what was approved will have their reimbursement denied.