



Staff Development and Wellness Allowance Program

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Reimbursements require proof of payment: an itemized payment receipt showing date and method of payment, payor, payee, and item(s) or service(s) paid for. Bank/credit card statements are acceptable but must include the employee name.

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About

The County of Sonoma is committed to providing efficient and high quality services to the community and recognizes the knowledge, skills, and well being of our workforce are critical to achieving this goal. Therefore, the employee Staff Development Benefit Allowance Program has been developed to encourage **learning** and **wellness**. Specifically, the Staff Development Benefit Allowance Program provides an annual reimbursement allowance, as negotiated by collective bargaining or contained in the Salary Resolution, to assist County employees achieve **professional and educational growth, safe lifestyles** to achieve personal **wellness and physical fitness, and resiliency goals**.





The Program covers work-related expenditures such as classes and seminars, professional memberships, registration fees, educational materials, tools and equipment. Additionally, the program may also be used for wellness activities by allowing participation in a wide variety of activities that promote emotional and physical fitness that are **not medically necessary** and would not otherwise be covered through a County-offered health plan.

All benefits provided under this Program are subject to applicable provisions of federal and/or state law, and County policies and procedures, as approved by the County Administrator and the Board of Supervisors. These policies and procedures include, but are not limited to the County Travel and Meal Reimbursement Policy, Vehicle Use Policy, Policy on Purchasing, Departmental Computer Use Policy, and

Department telework policies, guidance or agreements.

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How to File a Reimbursement Claim

Employee reimbursement claims must be filed electronically using the prescribed eForm. Instructions and link to the eForm:

To file a reimbursement claim, go to the [County of Sonoma eForms](#) page under [Employee Resources](#). You will need the following information when filing a claim:

- Employee ID#
- Network User-ID and Password
- Electronic copies of all receipts / proof of payment
- Approved telework agreement, as applicable
- Travel authorization, as applicable

For DSLEM employees only: Senior Manager email address (for Computer Hardware / Mobile Device claims in most Bargaining Units)

You can also monitor the status of your claims by reviewing your Dashboard on the [eForms](#) page after you log in.

- [Submitting Your Claim](#) » (PDF: 311 kB)
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Reimbursements require proof of payment: an itemized payment receipt showing date and method of payment, payor, payee, and item(s) or service(s) paid for. Bank/credit card statements are acceptable but must include the employee name.

Eligible Expenses

Examples of eligible expenses, exceptions and exclusions are listed for each category, including a general explanation of which expenses are taxable and any restrictions that may apply.

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Exceptions and Exclusions by Expense Category

The following provides a list of exclusions by expense category with examples. This list is **NOT** all inclusive, and the County reserves the right to exclude any expense which may not conform to the intent for the use of County funds or resources.

Employees are encouraged to seek guidance from the Department of Human Resources, Benefits Unit for clarification of these exclusions and reimbursable expenses before incurring the expense.



Ergonomic Office Expenses

- Financing or installment agreements. Only the monthly installment bill with proof of payment is eligible for reimbursement
- Consumable computer / laptop supplies (e.g. paper, ink cartridges, etc.)
- Service, maintenance agreements, warranties, or repair costs for qualified hardware and mobile devices
- All costs associated with a telecommunication provider, including telephone, data, and equipment charges.
- Personal living furniture (e.g. reclining chairs, armchairs, massage chairs, dining tables, side tables, coffee tables, lighting fixtures)
- Standard office supplies (the employee's department will provide standard office supplies (pens, paper, pencils, etc.) and in some instances may provide equipment or software, if feasible and approved by the department)
- Interest costs on leases, lease purchases, loans, etc. for the purchase of qualified hardware or mobile devices

Computer Hardware & Mobile Devices

- Financing or installment agreements. Only the monthly installment bill with proof of payment is eligible for reimbursement.
- Consumable computer / laptop supplies (e.g. paper, ink cartridges, etc.)
- Service, maintenance agreements, warranties, or repair costs for qualified hardware and mobile devices
- All costs associated with a telecommunication provider, including telephone, data, and equipment charges.
- Personal living furniture (e.g. reclining chairs, armchairs, massage chairs, dining tables, side tables, coffee tables, lighting fixtures)
- Interest costs on leases, lease purchases, loans, etc. for the purchase of qualified hardware or mobile devices

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Emergency Preparedness

- Clothing
- Disposable batteries
- Electrical installation
- Equipment warranties, repairs or service costs
- Extension cords
- Individual items intended as a "build it yourself" emergency kits (e.g. flashlights)
- Medical supplies
- Provisions for pets or animals
- Temporary living structures such as tents or trailers
- Transportation
- Two-way radios
- Water purification systems
- Weapons

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Professional & Educational

- Standard office supplies (the employee's department will provide standard office supplies (pens, paper, pencils, etc.) and in some instances may provide equipment or software, if feasible and approved by the department Magazine subscriptions, newspapers, periodicals or journals of general circulation, such as Time, Newsweek, Press Democrat, Wall Street Journal, etc.
- Consumable computer/laptop supplies (e.g. paper, ink cartridges, etc.) Internal modifications to County-owned computers or equipment
- Service, maintenance agreements, warranties, or repair costs for qualified hardware
- Interest costs on leases, lease purchases, loans, etc. for the purchase of qualified hardware or mobile devices
- Student loans, interest costs, loan fees
- All costs associated with a telecommunication provider, including telephone, data, and equipment charges.
- Social events or luncheons that are not directly related to County business are not reimbursable
- Tips are not reimbursable under Professional and Educational Expenses

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Wellness & Physical Fitness

- Uniforms, physical fitness or athletic clothing and apparel, including hats, and sunglasses
- Swimming pools, spas, saunas, hydrotherapy pools, or other similar items
- Martial arts supplies and equipment which are considered weapons or combative devices, such as knives, swords, nunchucks, batons
- Any expenditure related to hunting, fishing and camping and other outdoor activities not specifically outlined in the list of physical fitness activities located on the Healthy Habits Physical Activity webpage at <http://sonomacounty.ca.gov/HR/Benefits/Healthy-Habits/Health-Maintenance/Physical-Activity/>.
- Outdoor activities which include physical fitness activity such as hiking boots used to promote physical activity in conjunction with hunting are acceptable
- Lockers and locks
- Food, food and nutritional supplements, food preparation equipment, and medications
- Maintenance agreements, service, or repair costs for eligible equipment. (eg.bike repairs, tennis racket re-stringing, golf club shaft repairs)
- Residential programs for dietary / weight loss Any expenditures related to motorized vehicles or equipment (eg.. golf carts, boats, electric scooters/bikes/skateboards)
- Cost of animals, animal boarding, rental fees or expenses associated with storing or maintaining animals or physical fitness equipment used to participate in a fitness activity
- Any equipment related to physical fitness activities involving animals, including saddles, tack, leashes, harnesses, lead ropes. This exclusion does not include safety equipment which may be necessary to participate in the physical fitness activity, such as boots, riding helmets, and gloves
- Tips are not reimbursable under Wellness
- Furniture, beds and bedding, mattresses, including massage or vibrating chairs, tables
- Medical treatment and services which are usual and customarily provided through medical insurance, including co-pays, psychotherapy and hypnotherapy.
- Personal grooming services, such as facials, manicures, pedicures, botox injections, or other cosmetic enhancements.
- Fees for individual employee participating on a team only. Fee for entire team excluded.
- Travel, lodging, and food are not reimbursable under Wellness and Physical Fitness

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Filing a Reimbursement Claim

To file a reimbursement claim, go to the [County of Sonoma eForms](#) page under [Employee Resources](#). You will need the following information when filing a claim:

- Employee ID#
- Network User-ID and Password
- Electronic copies of all receipts / proof of payment
- Senior Manager email address (for Computer Hardware / Mobile Device claims in most Bargaining Units)

You can also monitor the status of your claims by reviewing your Dashboard on the [eForms](#) page after you log in.

Instructions and FAQs

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Tax Status

All benefits provided through this Program are subject to tax requirements of the Internal Revenue Code, and any other applicable federal and/or state law relating to the provision of employment fringe benefits. Fringe benefits for employees are considered taxable wages, unless specifically excluded by relevant sections of the Internal Revenue Code. The eligible reimbursable benefits provided through the Staff Development and Wellness Allowance Program are primarily governed by [IRC](#) §132.

Only those benefits which are **directly related to** or **required for** your job with the County of Sonoma are non-taxable, as defined by federal and/or state law and can be excluded from taxable wages, otherwise the reimbursement amount is considered a taxable wage and will be taxed through payroll. According to the [IRS](#), benefits are excluded from federal gross income as a working condition fringe benefit to the extent, if you had paid the expense yourself, you could claim the expense as a deductible business expense under [IRC](#) §162.

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Tracking Your Balance

Human Resources maintains benefit allowances in the Staff Development Database.

The benefit allowance balance reflects claims that have been processed and forwarded to Auditor-Controller-Treasurer-Tax Collector ([ACTTC](#)) Payroll for reimbursement in your payroll check.

To verify your current benefit balance:

[Staff Development Benefit Database »](#)

(<http://sc-intranet/hr/content.aspx?sid=1026&id=2268>)

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What is My Annual Allowance?

Generally, full and part time employees are eligible for this benefit. Specific benefits and eligibility vary according to the Memorandum of Understanding ([MOU](#)) for each Bargaining Unit or the Salary Resolution for unrepresented employees.

The annual allowance is the amount of reimbursable funds as negotiated for your Bargaining Unit and authorized by the Board of Supervisors.

Annual benefit allowances are provided on a fiscal year basis, from July 1 to June 30 annually.

For more information, see [Reimbursement Allowance by Bargaining Unit](#) »

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Ergonomic Office Expenses

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Employees who have been approved to telework may be reimbursed for ergonomic office expenses as part of their staff development/wellness benefit. For more information refer to your departmental telework policy, guidance document or agreement, if applicable. The following items below are now included as eligible reimbursable expenses under the new category of Ergonomic Office Expenses.

Tax Treatment: Taxable

REQUIREMENT: Employees must attach approved telework agreement for each eForm claim submission.

PLEASE NOTE: In the event the equipment is needed as part of a reasonable accommodation **in conjunction with a documented work restriction**, please discuss the need with your HR Liaison prior to making the purchase and seeking reimbursement.

Ergonomic Office Expenses:

- Cushions for office chair seat, lumbar support, and armrest
- Ergonomic document holders
- Footrests
- Laptop stands
- Lap desks
- Monitor risers
- Office chairs
- Office desks
- Wrist pad for keyboard and mouse

Exceptions and Exclusions

The following provides a list of exclusions with examples. This list is **NOT** all inclusive, and the County reserves the right to exclude any expense which may not conform to the intent for the use of County funds or resources. *Employees are encouraged to seek guidance from the Department of Human Resources at StaffDev@sonoma-county.org for clarification of these exclusions and reimbursable expenses before incurring the expense.*

- Financing or installment agreements. Only the monthly installment bill with proof of payment is eligible for reimbursement
- Consumable products such as computer / laptop supplies (e.g. paper, ink cartridges, etc.)
- Service, maintenance agreements, warranties, or repair costs for qualified hardware and mobile devices



- All costs associated with a telecommunication provider, including telephone, data and equipment charges
- Personal living furniture (e.g. reclining chairs, armchairs, massage chairs, dining tables, side tables, coffee tables, lighting fixtures)
- Standard office supplies (the employee's department will provide standard office supplies (e.g. pens, paper, pencils, etc.) and in some instances may provide equipment or software, if feasible and approved by the department)
- Interest costs on leases, lease purchases, loans, etc. for the purchase of qualified hardware or mobile devices