Submitting your Staff Development/Wellness Reimbursement Request

STEP 1

Make sure that you have an electronic version of your receipts/proof of payment of expense. You will need to upload this documentation in order to submit your claim. Please save a copy of your receipt to your desktop (a picture or scanned copy, a screenshot, or PDF).

STEP 2
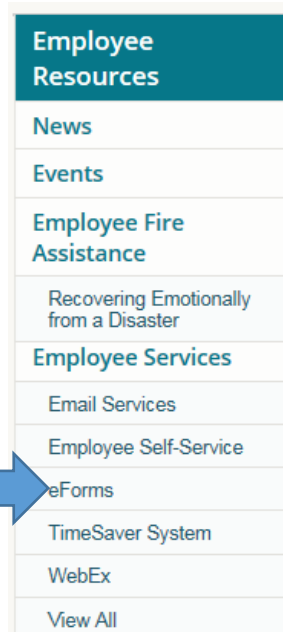
Go to the County of Sonoma web page here:

https://sonomacounty.ca.gov/Home/

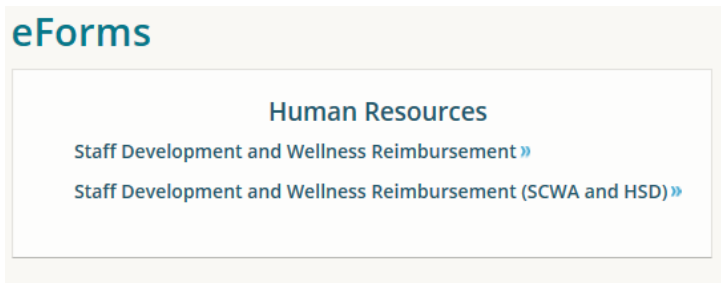and scroll down to select "Employee Resources" at the bottom of the page –

STEP 3
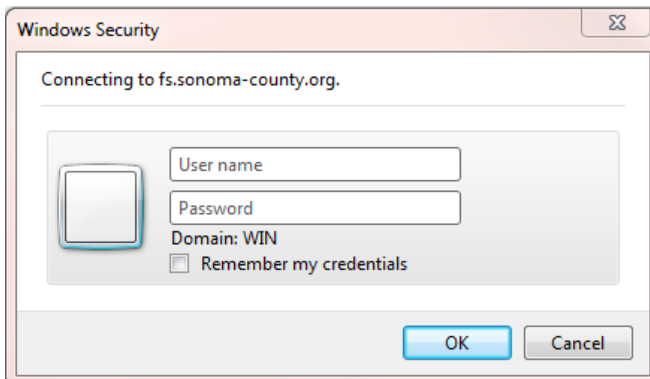
Select eForms from the left column

STEP 4

Choose the link that corresponds to your workgroup – County network employees will select the first link, SCWA and HSD employees will select the second.

STEP 5

County Network employees only Sign into the program using your network User Name and Password


If you do not see the popup, it might be behind the internet window. Try minimizing the window to locate the popup.

****Please note – if you use Firefox (or if you are logging in from home), you will need to add win\ before your User Name such as win\JaneDoe

STEP 6

Enter your Employee ID # in the field below and hit tab – this will populate your current information. Please double check that your contact information is correct. PLEASE NOTE: the available balance will **not** include any pending claims already submitted and not yet paid.

Staff Development / Wellness Reimbursement Request
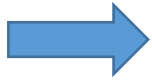
Employee ID # *

Employee First Name *

Employee Last Name *

Department *

Employee Email *

Day Phone *

Bargaining Unit # *

FTE *

(Does not include pending claims) Staff Development Available Balance

STEP 7

Select the appropriate category related to your Staff Development/Wellness expense. ***Please make sure to break out your expenses if you have multiple categories. You can file up to five claims on one submission.***

Item 1

If you are submitting for job required education, hardware and mobile devices, and SCDPDAA and/or SCPA educational training in conjunction with another category, you may want to consider filing a separate claim as these categories require routing for signature by your department.
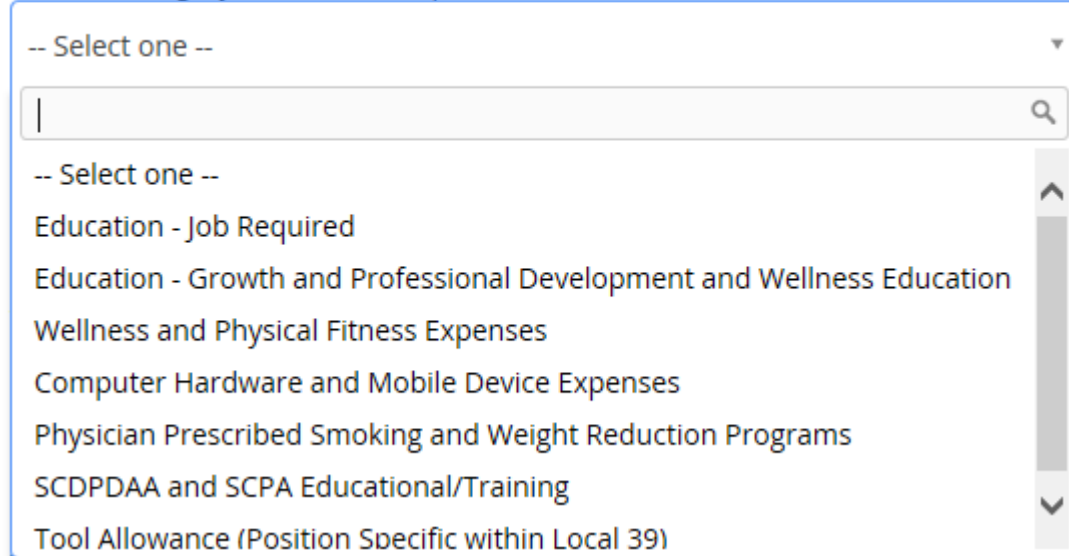
1. What Category of Staff Development is this item?

-- Select one --

Here are your options:

1. What Category of Staff Development is this item?

-- Select one -- ▾

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-- Select one --
Education - Job Required
Education - Growth and Professional Development and Wellness Education
Wellness and Physical Fitness Expenses
Computer Hardware and Mobile Device Expenses
Physician Prescribed Smoking and Weight Reduction Programs
SCDPDAA and SCPA Educational/Training
Tool Allowance (Position Specific within Local 39)

STEP 8

Once you have selected your category, additional fields for completion will appear. Any item with a red asterisk (*) is a required field. For items with sales tax, please break out the item and the sales tax paid on the item in the separate fields as indicated. For the date fields, you can click in the box to have the calendar pop up for date selection. Once you have completed the required fields for your expense, you have the option to add another item for reimbursement

☐ Add another item?

You can file for reimbursement for up to 5 items per claim submitted.

STEP 9

Upload your applicable receipts and proof of payment for expenses. If you traveled for work related expenses, make sure to upload your fully approved travel authorization form.

Upload Receipts or Relevant Files

Select files...

Tip: Scan your receipts and save them to your desktop or personal drive. To upload, click "Select files" and choose your files
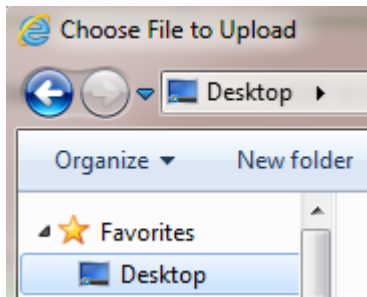
Find your document, and hit "Open" to upload. You can upload multiple documents – once you have uploaded one item, you can hit "Select files" again to choose additional documents

STEP 10

If you have submitted a Computer Hardware/Mobile Devices claim you will be required to provide the email address for a Senior Manager in your department that has the authority to approve your claim. This does not apply to departments outside of the County's AFDS network such as Human Services and Water Agency as those will be automatically routed to the appropriate manager.

STEP 11

You must now review the statement that confirms you are filing for reimbursement in accordance with County Policies and MOU's, etc. Select the checkbox to acknowledge. Click "Submit" to submit your claim. *If you are unable to submit the form, please ensure that all mandatory fields are completed.
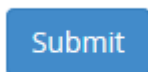
You will be prompted to electronically sign your request for reimbursement –

Click to sign and the Adobe Sign window will appear – click on the signature line and type your signature – select "Apply". **Scroll down the page and select the blue "Click to Sign" icon and you will have submitted your claim!**

I agree to the Terms of Use and Consumer Disclosure of this document   **Click to Sign**

Notifications on your request will be received from the following email address:

Sonoma-County-eForms@sonoma-county.org

Any claims which require management approval will be automatically routed to the appropriate manager. All other claims will be submitted to HR. You will receive email confirmation of receipt when your claim is received and also when your claim has been processed.
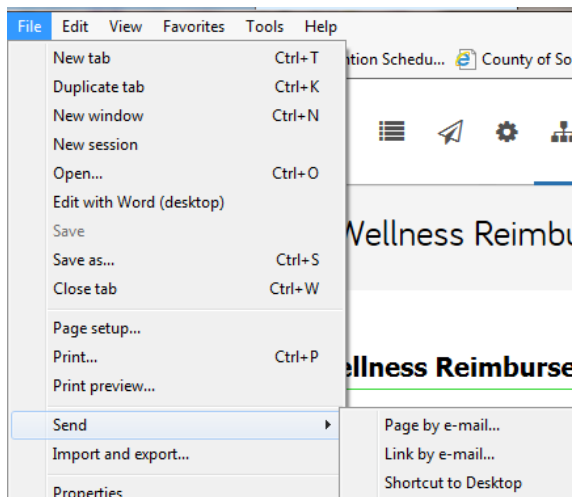
ADDITIONAL TIPS:

Planning additional claims? Save a shortcut to the form directly to your desktop!

Internet Explorer:

Select "File" in the upper left corner

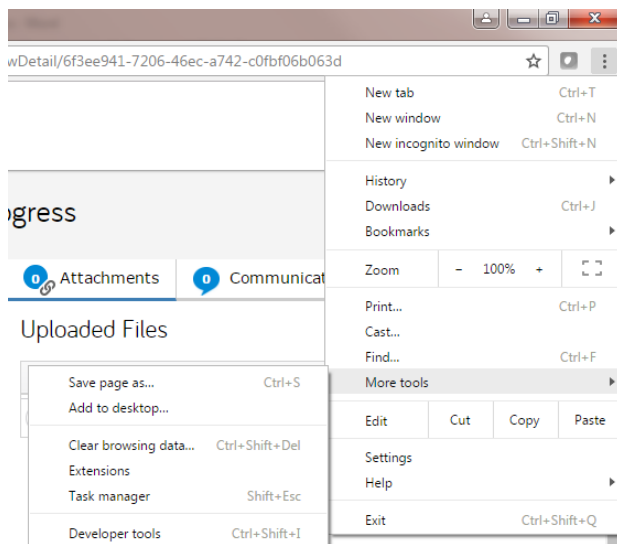Select "Send" and "Shortcut to desktop"
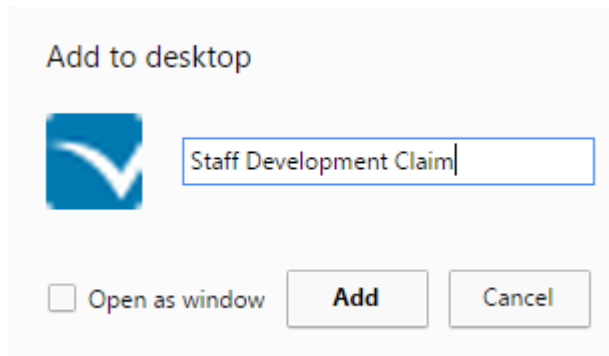

Google Chrome:

Select the 3 dots in the upper right corner

Select "More Tools" and "Add to Desktop"

Complete the name for the shortcut and select "Add"

You can also monitor the status of your claim by reviewing your Dashboard. The Dashboard is your ThinkSmart home page – you can also initiate other e-forms or review forms assigned to you for processing. To locate your Dashboard, once in ThinkSmart, select the icon with four dots/lines:

You can follow the steps listed above to save the Dashboard to your desktop.