HRDF Manual

HRF FINANCE
HRS ORGANIZATIONAL HEALTH AND EFFECTIVENESS

Updated March 2017
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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.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Eligibility</th>
<th>Timing</th>
<th>Maximum Entitlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual 1</td>
<td>No</td>
<td>Not applicable</td>
<td>None</td>
</tr>
<tr>
<td>Casual 2</td>
<td>Yes</td>
<td>When Casual 2 starts</td>
<td>$500 per fiscal year*</td>
</tr>
<tr>
<td>Auxiliary</td>
<td>Yes</td>
<td>When Auxiliary starts</td>
<td>$750 per fiscal year*</td>
</tr>
<tr>
<td>Regular</td>
<td>Yes</td>
<td>When Regular starts</td>
<td>$750 per fiscal year</td>
</tr>
<tr>
<td>Excluded Employees</td>
<td>No</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

* 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 Common Provisions – Operating & Trust: Article 24. 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 do not have a computer in your position on campus, a paper application will be accepted; otherwise, employees need to use E-HRDF for all HRDF submissions. 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.

Your HRDF application does not constitute registration in a course. You are responsible for registering yourself in the course. Either you or your department must pay the registration costs to the course provider. Please keep all receipts, as you will need them for reimbursement later.

If the course is offered through the Technology Training Centre (TTC), Faculty of Extension or Organizational Health & Effectiveness (OHE), an invoice can be sent directly from these course providers to HRDF. You only need to let the course provider (TTC, Extension or OHE) know you have been approved for HRDF. Receipts do not need to be submitted to the HRDF Office on your part in this type of 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 serve 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 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.
2.2 When to Apply for Funding

<table>
<thead>
<tr>
<th>For courses/conferences which start between:</th>
<th>Applications will be accepted beginning:</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 1-June 30</td>
<td>March 1</td>
</tr>
<tr>
<td>July 1 – September 30</td>
<td>June 1</td>
</tr>
<tr>
<td>October 1 – December 31</td>
<td>September 1</td>
</tr>
<tr>
<td>January 1-March 31</td>
<td>December 1</td>
</tr>
</tbody>
</table>

E-HRDF will not process any applications prior to the permitted date.

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

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

**Supervisory Leadership Program**

HRDF-eligible employees who are not currently supervisors but aspire to supervisory positions may apply for HRDF to offset the cost of taking the Human Resource Services’ Supervisory Leadership Program offered by Organizational Health and Effectiveness (OHE)
http://www.hrs.ualberta.ca/Learning/Programs/Leadership/SupervisoryLeadership.aspx.

Support Staff members who already have supervisory responsibilities may take the program free of
charge (no HRDF necessary). Support Staff members who are promoted into a supervisory position may also take the program free of charge.

2.4 Courses that Will Not Be Funded

Courses that are required for you to perform day-to-day 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 entitlement 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.

Once the borrowed application has been submitted and approved, employees must submit a regular course application for the conference or for each course taken in the program of study. The HRDF Office cannot process any borrowed reimbursements until the regular course applications are submitted.

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 through the Technology Training Centre (TTC), Organizational Health & Effectiveness (OHE) or the Faculty of Extension. These course providers can invoice HRDF directly. You only need to let these providers know you have been approved for HRDF by providing the HRDF application number.

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

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%.

### 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:

**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. There will also be a box to enter the location of the course. Please include the country if outside Canada. 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.

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.

Type

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

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

Length

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

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.

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

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 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.

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:

Course Expenses / Payment Options
For U of A courses, the employee can pay up front and submit the course receipt to the HRDF Office at 2-60 University Terrace. If the course is offered by the Technology Training Centre (TTC), Faculty of Extension, or Organizational Health and Effectiveness (OHE), an invoice can be sent directly to the HRDF office by these course providers. You only have to let these course providers know you are approved for HRDF by providing the HRDF application number. Receipts do not need to be submitted to the HRDF Office in this type of case only.

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 but may also be used for other course expenses. If your department is paying, the system will require the CCID of your financial authority (Finance Officer, APO, Trust Holder, etc.). This individual will be contacted via email to provide approval for the expenses and department financial information for the 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.

**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 and provide department financial information for the reimbursement. 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.

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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. Once the borrowed application has been submitted and approved, employees must submit a regular course application for the conference or for each course taken in the program of study. The HRDF Office cannot process any borrowed reimbursements until the regular course applications are submitted.
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.

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://appshrs.ualberta.ca/HRDFOnline/Approver](https://appshrs.ualberta.ca/HRDFOnline/Approver).
The Approver home page shows a list of new applications awaiting your approval, as shown below:

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:

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.

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

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**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](http://www.hrs.ualberta.ca/Learning/Funding/HRDF.aspx)
- E-HRDF website (requires CCID log-in):
  [https://apps.hrs.ualberta.ca/HRDFOnline](https://apps.hrs.ualberta.ca/HRDFOnline)
- HRDF printable application form:

**Collective Agreements information on HRDF:**

- Common Provision – Operating & Trust, Article 24:
- ESL Agreement (Part C) Article 19:
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 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.

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 considered 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 Employee Relations Consultant 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 OHE. Why do I receive a reminder to submit my receipts?
Answer: Reminder emails for receipts are automatic and all employees whose courses have ended will receive the reminder unless the HRDF Office has received the receipts or been invoiced by the internal course providers (TTC, Extension and OHE only). You do not need to send receipts in this case. Please contact the course provider to ensure they have invoiced HRDF directly.

**Q6: I received approval on my borrowed application, what is my next step?**

Answer: Once the borrowed application has been submitted and approved, employees must submit a regular course application for the conference or for each course taken in the program of study. The HRDF Office cannot process any borrowed reimbursements until the regular course applications are submitted.
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 because HRDF cannot process travel claims. This option may be used for local courses as well.

For courses requiring travel, the department must either pay the expenses directly or have the employee pay for the expenses and then submit a travel claim and receive reimbursement from 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 to use for the HRDF reimbursement to the department.

For reimbursement, send a printout or copy of the journal ledger to the HRDF office at 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.