Allied Health Professionals + Professional Development Reimbursement Program
Policy Directive

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Policy Directive

1. Policy Statement

Current SA Health employees are supported through investment in training and development as detailed by Clause 21, Professional Development and Maintenance of Professional Registration/Accreditation, South Australian Modern Public Sector Enterprise Agreement: Salaried 2017.

These instructions have been developed to assist both applicants with the application requirements and the Department Head (or delegate) when recommending the application and any required Professional Development (PD) leave (see Clause 21.1).

The Department Head (or delegate) is responsible for the recommendation of the Professional Development reimbursement for eligible staff. Final approval for accessing the entitlement is delegated to the Statewide Allied Health Professionals + Professional Development Reimbursement Program (AHP+PDRP) Panel.

Normal application processes for leave and financial support at Local Health Network (LHN) level remain in place. The AHP+PDRP funding is additional to the usual support provided by LHNs to staff. When the rounds are open, applications can be submitted by individuals or groups via the pre-approval (not available in all rounds for individual applications) or direct reimbursement processes (available in all rounds). The PD event must occur within a reasonable timeframe if being undertaken in a new AHP+PDRP year. Organisers of group applications have an additional set of responsibilities as outlined in item 5.4 (refer page 10).

All application requirements are outlined on the AHP+PDRP webpage and all applications must be lodged on-line. Note that for group applications, if the cost per head is above $200 this amount is deducted from the total, annual allocation for each attendee. If the attendee has already expended the capped amount of allocated funds within that financial year, the LHN or individual will need to pay for the remaining cost for the attendee to undertake the PD. If per head costs are below $200 for group events, this is not deducted from the individual’s allocation.

2. Roles and Responsibilities

2.1 Chief Executive
The Chief Executive has ultimate responsibility for the effective implementation of this policy. As far as is reasonably practicable, the Chief Executive must ensure that:
* All levels of management are aware of their responsibilities in relation to this policy;
* All employees, access appointees and contractors are aware of their responsibilities in relation to this policy; and
* Adequate resources are made available to implement this policy.

2.2 Department Head (or delegate)
Department Heads (or delegate) are responsible for:
* Participating in the implementation of this policy;
* Complying with this policy and local procedures; and
* Ensuring that the access of professional development by an allied health professional or other eligible employee has a direct benefit to his/her skill, knowledge or career development as a clinician providing a service to the SA public health system;
* ensuring approved HR-077 form for overseas travel is included in the relevant applications.
2.3 Employees
Employees are responsible for:
• Participating in the implementation of this policy;
• Complying with this policy and local procedures;
• Providing accurate and timely information; and
• Advising the AHP+ PDRP program if you did not attend an approved event or wish to withdraw your application.

2.4 Organisers of Group Applications
Employees who are the nominated organiser for a group event are responsible for:
• Completion of the group application form including a detailed outline of the event with an indicative cost per head and maximum numbers;
• Gain approval from the Statewide AHP+ PDRP Panel via the pre-approval application process.
• Coordination of any associated Expression of Interest process to attract attendees;
• Completion of a signed, simple service letter with the facilitator indicating the type of services to be received; the date of the event; the number of potential attendees; a milestone schedule of fee payment if the facilitator has requested a development fee as well as a facilitator fee; and supply of a confirmed attendee list once the event has been conducted;
• Coordinate any accommodation and flights details for the facilitator and marketing of the event (and any associated evaluation process);
• Provision of the valid tax invoice at the workshop and confirmed attendee list once the event has been conducted to the AHP+PDRP;
• If initial payment is via a Department cost centre, supply AHP+ PDRP with the name of the Finance liaison person and the 17 digit Responsibility Index (RI) so the reimbursement can occur;
• If workshop details change, such as the event being held later or in the next financial year, contact the AHP+ PDRP team to authorise this change.

3. Policy Requirements
These instructions should be read and applied in conjunction with the Enterprise Agreement particularly Clause 21 as follows:

21.1 An employee classified as an AHP; DSO; GFSc; LE; LEC; LSC; MeS; MPH; PO, for whom an appropriate professional qualification is specified by the employing public sector agency as a minimum essential qualification for the performance by the employee of the duties for which he or she is employed, will be entitled to reimbursement of the reasonable cost of professional development expenses incurred during their employment, provided that:

21.1.1 The professional development is a compulsory requirement of a recognised professional registration or accreditation body applicable to the employee’s professional capacity in order for the employee to maintain or acquire his or her registration or accreditation in the professional occupation or capacity in which he or she is employed; and

21.1.2 The agency explicitly requires such registration or accreditation to be maintained or acquired for the performance by the employee of the duties for which he or she is employed.

21.2 Reimbursement will not apply:

21.2.1 If the employee does not successfully complete the relevant professional development; or
21.2.2 If the employee ceases for any reason to be registered or accredited or is the subject of any disciplinary process being undertaken by the registration or accreditation body that may result in loss of registration or accreditation (but reimbursement will apply if there is no adverse disciplinary finding); or

21.2.3 If the fees or charges were partly or wholly incurred before entering employment with the agency or undertaking with the agency the duties of the applicable professional occupation, provided that the agency may agree to meet any part that arises during employment or the performance of the relevant duties.

As provided by the Enterprise Agreement, recommendation for employees accessing their entitlement to reasonable cost of appropriate PD is the responsibility of the employee’s direct Department Head (or delegate).

The Department Head (or delegate) is generally the person responsible for amongst other things the employee’s performance development plan. A Performance Review and Development (PR&D) plan should be in place however the absence of a plan will not preclude approval.

Reasonable reimbursement funding (up to the capped allocation per employee, as determined by the AHP+PDRP Advisory Panel) is available through the AHP+PDRP for individual/group activity costs incurred during the period 1 April and 31 March. This allows reimbursements to be made by 30 June of the current financial year.

Applications will not be approved if they have been paid using a salary sacrifice card / account (such as Maxxia), as they have already received a benefit via a reduction in taxable income.

Alignment of the employee’s learning and development needs (outlined in the PR&D plan) and the service needs should occur collaboratively between the employee and the Department Head (or delegate, refer section 5.2), prior to the reimbursement application. By doing so, the uncertainty relating to what is appropriate professional development entitlement may be reduced.

An important principle underlying the various professional development provisions in the Enterprise Agreement is that it is an entitlement and should not unreasonably be withheld or denied. Nevertheless, a Department Head (or delegate) should be satisfied that the access of PD by an allied health professional or other eligible employee will have a direct benefit to his/her skill, knowledge or career development as a clinician providing a service to the consumers of the SA public health system. Approval from the Department Head (or delegate) must be given prior to any leave being taken for the purpose of professional development.

Approval from the Statewide AHP+PDRP Advisory Panel is required before any reimbursement is issued. Applicants and the Department Head (or delegate) will be notified of the outcome of the application via email.

Reimbursement will be by an Electronic Funds Transfer (EFT) process only (no cheques), with a capped approval amount that is reviewed annually by the Statewide AHP+PDRP Advisory Panel. The minimum approval amount will be $200, you can include more than one activity in an application to meet the $200 threshold. Multiple applications within the same financial year from the same employee will be viewed cumulatively.

The notion of linking professional development entitlements directly with the employee’s work/career is important particularly because of Fringe Benefits Tax (FBT) implications. For instance, self-education expenses including conferences and seminars, plus travel and accommodation associated with attendance may be FBT exempt, provided it can be demonstrated they are for the purposes of:

- Improving work related knowledge or skills of current employment;
• Keeping up to date to enable better discharge of duties of current employment;
• Seeking a further qualification relevant to the duties of current employment (not in an unrelated field).

The study must be related to the employee’s current employment and appropriate documentation must be supplied, including valid tax invoices, proof of payment i.e. bank statement, declaration forms and any associated travel forms.

However, linking professional development entitlements to the employee’s current employment is not the only FBT test. Education fees associated with courses at educational institutions would be subject to FBT if they are a Commonwealth Supported Placement (CSP) or are part of a Higher Education Loan Repayment (HELP) scheme (e.g. HECS-HELP or FEE-HELP).

Both Department Heads (and delegates) and employees considering applying for the AHP+ PDRP are strongly advised to read the following SA Health policies:
- Travel and FBT Policy Directive
- SA Health Travel Diary
- Tax Fact Sheet 19 - Documentary Evidence

Any enquiries regarding the taxation interpretation of the above policies should be directed to the SA Health Taxation Services Helpdesk by email at HealthTaxHelpdesk@sa.gov.au, if employees are unable to resolve their queries through their LHN in the first instance. SA Health Taxation Services are not permitted by law to give personal tax advice.

3.1 Approved Expenses

Expenses associated with the following activities/items will generally be approved as they are considered appropriate PD activities/items, can be efficiently administered within the AHP+PDRP, and do not attract FBT if appropriate documentation is held. These include:
• Fees for work-related conference or seminar;
• SA Health AHP+ PDRP funded workshops;
• Supervision fees when suitable supervisors are not available internally within SA Health;
• Examination, Recognition of Prior Learning and associated fees to extend current scope of practice skills. This may include textbooks/work manuals directly related to these activities;
• Airfares and/or accommodation expenses incurred on work-related conferences or seminars, attending an educational institution or on overseas study tours or sabbaticals where the employee is away from home overnight or on overseas study tours (see Overseas Travel Note below);
• Incidental travel expenses when travelling overseas (e.g train or bus) from an airport to conference / study tour location may be reimbursed subject to a valid tax invoice including name of the applicant being supplied.
• Course or tuition fees for students in full-fee paying post graduate courses* at an educational institution (excluding student union fees). Please note: Fees must be paid up-front. Fees paid via a Higher Education Loan Repayment (HELP) scheme will not be approved.

* Eligible post graduate courses are those that do not have Commonwealth supported places. Students in Commonwealth supported places must pay Student Contribution Fees – these will not be reimbursed regardless of whether they are paid up-front or via HECS HELP.

Travel and accommodation associated with the above:
• Travel and accommodation costs include airfares, accommodation, and incidental transfer costs [e.g. taxi fares, train or airport buses related to the activity and where a valid tax invoice with the employees name is provided] Travel approval and a travel diary will be required for domestic travel for more than 5 nights, any overseas travel and any dual purpose travel (i.e. travel with both business and private components).
Note:
I. Accommodation is capped at $250 AUD per night.

II. Travel costs may also be subject to FBT if the trip is deemed to have a private component to it of more than 3 private days. Please note that weekend days before or after the business component of travel are counted as private days.

III. Travel insurance is viewed by the ATO as a private expense and will be subject to FBT, even if the trip is 100% business related. Consequently the AHP+PDRP does not reimburse purchase of travel insurance.

IV. The AHP+PDRP cannot fund fees or penalties associated with cancelled bookings when planned professional development activities change or the applicant can no longer attend the event. Therefore it is strongly recommended that the individual takes out travel insurance at their own expense (or at least chooses flexible booking options), to protect themselves if circumstances change.

V. Allied and Scientific Health Professionals Overseas Travel documentation
The following policy outlines the process and documentation requirements for overseas travel. See page 23 for AHP particulars.

3.2 Overseas Travel Policy Directive
The HR-077 Overseas Travel Application Form (available on the webpage) must be approved by the relevant LHN Chief Executive Officer or Group Executive Director and submitted with the AHP+PDRP application prior to overseas travel being undertaken.
NOTE: registration fees and accommodation costs during the conference are the only items eligible for reimbursement should greater than three private days be taken, in this scenario a HR077 will be required.

Upon return, endorsement of the travel diary must occur as confirmation of actual travel undertaken and submitted locally to the delegate. Final approval for accessing funding for overseas travel expenses sits with the Statewide AHP+PDRP Advisory Panel.

Allied and Scientific Health Professionals who are seeking reimbursement of registration/conference fees only for overseas PD activities whilst on personal leave (for example, approved annual leave), are not required to seek approval of the relevant CEO or Group ED to travel overseas. A HR-077 form and travel diary are not required to be submitted in this instance.

3.3 Items Not for Approval
The following are not considered genuine professional development items and will not be approved:
• Any activities paid on a MAXXIA card (or other salary sacrifice account);
• Entertaining colleagues/others while at courses/conferences;
• Accommodation costs on personal days within a dual purpose application;
• Purchase of meals or refreshments etc. to staff;
• Purchase of medical equipment (e.g. stethoscopes) which may be used on patients by self or others;
• Professional registration, professional association membership or Union fees;
• Professional insurance;
• Computers (including laptops)/ PDAs/ iPads/ Mobile Phones or phone plans;
• Internet subscriptions i.e. rental/plan costs etc.;
• Audio-visual equipment including TV sets, monitors, cameras, etc.
Reimbursement for the following items should continue to be supported through existing local funding rather than the AHP+PDRP. The AHP+PDRP will not approve these items as the expenditure associated with them is difficult to administer efficiently via the AHP+ PDRP or has been deemed the responsibility of departments or employees:

- Incidental travel expenses (e.g. petrol mileage and meals;)
- Text books and professional or trade journals; and
- Coaching or mentoring activities.

### 3.4 Forms and supporting documentation to be provided

Employees accessing their professional development entitlements are required to complete the following forms, and forward to their Department Head (or delegate) for recommendation for approval. All forms are available on the AHP+ PDRP webpage. All documentation must be complete and submitted online. Applicants need to provide all requested documents as per the webpage directions by the close date or the application will be considered incomplete and not be approved.

Documents include:

- The Eligibility Check;
- AHP+ PDRP Application Form (individual or group);
- SA Health Employee Accounts Payable/Creation Maintenance Form needs to be completed by all new applicants and by recurring applicants when payment details have changed, to enable the transfer of funds. Maintenance of correct banking details is the applicant’s responsibility;
- Expense Payment Declaration – AHP+PDRP supports activities that are 100% work related. Applicants need to state clearly on their EPD form that their PD activity is 100% work related in order for it to be considered;
- HR-077 Overseas Travel Application Form (when relevant);
- Travel diary (for domestic travel more than 5 nights or any overseas travel);
- For the pre-approval process, a signed Managers/Directors Support Form;
- A valid tax invoice. If the invoice is provided in currency other than Australian Dollars, applicants must provide evidence of the final amount in Australian Dollars.
- Proof of payment including the applicant’s name.
- Third party form (when relevant due to shared payments).

### 3.5 Receiving an overpayment or if no longer employed by SA Health

Where an applicant receives an overpayment from the AHP+ PDRP (including if they are no longer a SA Health employee at the time of the PD event) they are required to contact the AHP+ PDRP team on 8226 6406 to discuss SA Health’s process for repaying any funding received.

An employee will be invoiced for any FBT shortfall by SA Health Finance and Corporate Services.

### 4. Implementation & Monitoring

An annual report on the activity undertaken as part of the AHP+ PDRP is provided at the completion of each financial year in line with the SA Health Annual Reporting requirements.

As required the ASHO is responsible for providing reports to the Policy and Governance Branch on acquitted Allied and Scientific Health Professional overseas travel reimbursements as part of approved AHP+PDRP activities.
5. National Safety and Quality Health Service Standards

Standard 1 of the NSQHS Standards describes the quality framework required for health service organisations to implement safe systems. The following criterion and actions are specific to credentialing and scope of clinical practice.

1.12 Ensuring that systems are in place for ongoing safety and quality education and training:

1.12.1 The clinical and relevant non-clinical workforce have access to ongoing safety and quality education and training for identified professional and personal development.

6. Definitions

In the context of this document:

- Local Health Network means one of the following, Central Adelaide Health LHN, Southern Adelaide LHN, Northern Adelaide LHN, Women’s and Children’s Health Network, Country Health SA LHN, SA Ambulance Service or the Department for Health and Ageing. These are the incorporated bodies which also include state-wide services such as SA Pathology, SA Pharmacy and SA Medical Imaging within their corporate structures.

- Professional means an Allied or Scientific Health professional classified as an AHP; DSO; GFSc; LE; LEC; MeS; MPH or PO or manager who meets the profession’s requirements for registration or membership of a professional association.
7. Associated Policy Directives / Policy Guidelines and Resources

Australian Commission on Safety and Quality in Healthcare
SA Health Performance Review and Development Policy Directive
SA Health Allied Health Clinical Supervision Framework 2014
South Australian Modern Public Sector Enterprise Agreement

8. Document Ownership & History

Document developed by: Allied and Scientific Health Office, Office for Professional Leadership, System Performance

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- Does this policy amend or update an existing policy? Y
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