

Continuing Professional Development (CPD) Fund for MERAS Midwives (Capital, Coast and Hutt Valley)

As an outcome of the Midwifery Employee and Advisory Services (MERAS) MECA each Te Whatu Ora district (previously DHB) is required to commit a sum of \$1,000 per MERAS member (midwife headcount) for each financial year (from 1 July to 30 June), to enable midwives to meet approved professional development requirements. This funding can be accessed by MERAS members only. Unused funds will remain available for use for up to a further 12 months following the end of each financial year. This is effective from 1 July 2021.

MERAS members will no longer be able to access a broader nursing professional development funding pool.

The Quality and Leadership Programme (QLP) funding will still be accessible.

Te Whatu Ora – Health New Zealand Capital, Coast and Hutt Valley acknowledge a commitment to supporting the continued safe practice of its midwives and to supporting opportunities for the development of knowledge and skills which will benefit the midwife, the women/pregnant people she works with and the organisation.

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1. What will the MERAS CPD funding cover?

The fund is for the period 1 July to 30 June of each year:

- a) **Memberships:** All midwives (including those on Individual Employment Agreements) may access the CPD fund for reimbursement (on presentation of official invoice with GST number and receipt – generated via the NZCOM portal), the cost of membership to the New Zealand College of Midwives (NZCOM), the professional association that is directly relevant to the employed midwife’s duties, to a maximum of \$345 per annum (as per MECA). Where the employee also works for another organisation, or in private practice, the payment will be pro-rata.
- b) **Courses:** All midwives (including those on Individual Employment Agreements) may request funding towards any courses/programmes that are relevant to the individual’s professional development within healthcare and must be related to the midwifery scope of practice, position profile or career development. This includes:
 - 1. Tertiary education courses, papers and programmes (applications for post graduate funding should in the first instance be made to Health Workforce New Zealand for funding administered by NZCOM)
 - 2. External provider workshops or courses

3. Conference registration
 4. Costs related to textbooks, travel and accommodation can be considered where these are within the individual midwife's funding allocation for that year.
- c) All midwives must declare if they have applied for funding from another source (regardless of outcome of the funding application at the time of this application). Funding from the CPD fund will not be granted for the successful applicant to repay another grant/trust fund.

2. Before I start – what do I need to know?

To access your funds, you need to complete the two-part process in steps 1 & 2:

1. MERAS midwives professional development fund application e-form: approved by manager & clinical leads - Cherwell CPD
2. Staff reimbursement e-form: approved by DONM/manager – FlexiPurchase

Cherwell CPD application information

- a) All applications will be considered and the outcome of that application advised via email.
- b) Before approving your line manager will review leave balances, impact on service/rostering (for popular conference/event), and \$1000 yearly funding balance.
- c) Roster capabilities will be taken into account before a final decision on the funding application is made.
- d) Applications for popular conferences and events will be advertised widely within the midwifery service. These will not require invoice / proof of purchase to be attached in Cherwell until your line manager advises you have been selected.
- e) Dispute resolutions will be discussed at the Midwifery CPD Committee meeting (quarterly) unless a decision is required earlier.

FlexiPurchase staff reimbursement claiming

- a) A FlexiPurchase login is required for CPD reimbursement claims. You should receive this after your start date, or contact:
Staff Reimbursements [CCDHB] RES-StaffReimburse@ccdhb.org.nz
Staff Accounts_Payable [HVDHB] RES-Accounts_Payable@huttvalleydhb.org.nz
- b) All applications must contain appropriate documentation, tax receipts and/or proof of purchase and a copy of your Cherwell CPD application approval email (scan or print as PDF to attach)
- c) Where pre-approval has been granted in Cherwell prior to study – a certificate or other evidence of attendance must be uploaded to the Cherwell application within 3 months of course completion. Failure to provide this may result in a request for money to be repaid to the CPD fund.
- d) If you are employed at both Capital Coast and Hutt Valley – please put your claim through with your main place of employment as a midwife. FlexiPurchase CPD payments may be made separately to Payroll/Salary payments.

STEP 1: Applying for MERAS CPD funding / Cherwell

See information on funding criteria on page 1 & 2 before applying.

1. Login to Citrix desktop onsite, or if offsite [click here](#)
2. Use link **[Cherwell Professional Development Funding Application Form \(click here\)](#)** to access the MERAS CPD Fund. *Copy link into Google Chrome (if link doesn't open properly)*
3. Click on 'Start New Application'
4. Access MERAS midwifery CPD form by clicking on **MERAS Midwives** button to change form from NZNO PDRP application. Otherwise, claims may be declined.
5. Complete form ensuring you attach a copy of all course materials / invoice / proof of purchase as listed on the form.
6. For popular courses / training where pre-approval is required. No invoice / proof of purchase needs to be up loaded into Cherwell until your line manager advises you that you have been selected and approved for study / conference leave.
7. Your manager will approve and midwifery leadership team will send APPROVAL by email.
8. Cherwell APPROVAL email is required before you complete step two FlexiPurchase expense reimbursement claim. Print and scan on the photocopier OR print from your computer to PDF by changing your printer from FollowMe to 'Microsoft print to PDF' or 'PDF writer'.
9. Save in a file on your computer ready to upload.

STEP 2: Applying for reimbursement of expenses / FlexiPurchase

See information on reimbursements on page 1 & 2 before applying.

If you have difficulty in completing, please speak to the clinical educators or coaches, managers or email MidwiferyCPD@ccdhb.org.nz or read FAQs for common issues.

Check for any of the following application errors which will prevent your claim being paid:

Completing FlexiPurchase claim prior to funding approval in Cherwell

Not attaching Cherwell approval email to claim

Using the incorrect account/cost centre

Claiming for NZCOM fees for more than the \$345 upper limit per annum

Claims for APC, MSR or expenses which are not covered by MERAS CPD (page 1)

No attached tax receipt / proof of purchase

Claims made for another staff member on your FlexiPurchase account.



1: OBTAIN AND EMAIL RECEIPT (OR PROOF OF PAYMENT)

Obtain a **tax invoice and/or tax receipt** at the time of purchase. If made online you will need to ensure you are emailed a receipt. For tax invoice/receipt requirements as specified by IRD, or click on the following link to see this information on the IRD website:

<https://www.ird.govt.nz/gst/tax-invoices-for-gst>

Proof of payment such as a copy of a bank or credit card statement can be provided if you do not receive a receipt when you have made your purchase. Screenshots of the actual bank transactions are credible and will be accepted.

Foreign currency expenses: If you receive a tax invoice/receipt in a foreign currency, you will claim for your expense in NZD. You will need to provide proof of currency conversion, or bank account proof, to show how you got the NZD amount. This is required for auditing purposes and if not provided, will find your claim on hold until sorted.

For example: If you pay for your expense in GBP, you will need to take a screenshot/snippet of the exchange rate you used to calculate the NZD amount. This screenshot/snippet will need to be uploaded with your supporting documents.

Have all of your supporting documents before starting your claim in an open folder ready to upload into your claim.

2: LOGIN TO FLEXIPURCHASE

Logon to FlexiPurchase at: www.FlexiPurchase.com

If you forget your password / or have not received a username and password contact:

Staff Reimbursements [CCDHB] RES-StaffReimburse@ccdhb.org.nz

Staff Accounts_Payable [HVDHB] RES-Accounts_Payable@huttvalleydhb.org.nz

*Some screens differ in FlexiPurchase between Capital Coast & Hutt Valley
– we have listed where this occurs.*

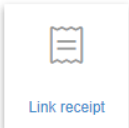
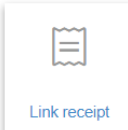
3: CREATE A NEW CLAIM IN FLEXIPURCHASE

1. Click on the button below to create a new expense claim (or click expenses to view an partially completed claim).

Hutt Valley	Capital Coast
+ Staff Reimbursement Claim	+ Cash Expenses

4: ADD DESCRIPTION, EXPENSE DATE & AMOUNT

Enter details of your expense as below, and proceed by selecting -> Next.

Hutt Valley	Capital Coast
<p>Enter description as <u>Name of Supplier</u> (as listed on receipt), date and the total expense amount (incl tax).</p> <p>* Create Staff Reimbursemen...</p> <p>Please enter the name of the supplier in the 'Expense Claim Label' (as shown on your tax invoice/receipt). If your receipt is in foreign currency, select the correct currency option from the 'Expense Incurred in' field. Enter in the exchange rate from your credit card statement or from your bank's...Read more.</p> <p style="text-align: center;"> Link receipt</p> <p>Description (maximum of 50 characters) *</p> <p>Date of expense (dd mmm yyyy) * 05 Apr 2023</p> <p>Amount (including tax) NZD</p> <p>Expense Incurred in: * New Zealand Dollar</p> <p>Reimbursements are in NZD: * New Zealand Dollar</p>	<p>Enter description as <u>MERAS Midwife CPD</u>, date and the total expense amount (incl tax).</p> <p>* Create Cash expense</p> <p>Enter one (1) claim per receipt. Provide a description of what and why this submission is for.</p> <p style="text-align: center;"> Link receipt</p> <p>Description (maximum of 50 characters) *</p> <p>Date of expense (dd mmm yyyy) * 05 Apr 2023</p> <p>Amount (including tax) NZD</p> <p>Expense incurred in: * New Zealand Dollar</p> <p>Reimburse me in: * New Zealand Dollar</p>

5: CHOOSE RELEVANT SPEND WIZARD OPTION

Enter details of your expense as below, and proceed by selecting -> Next.

The amount in 'allocated' and step 4 must match before you can press next.

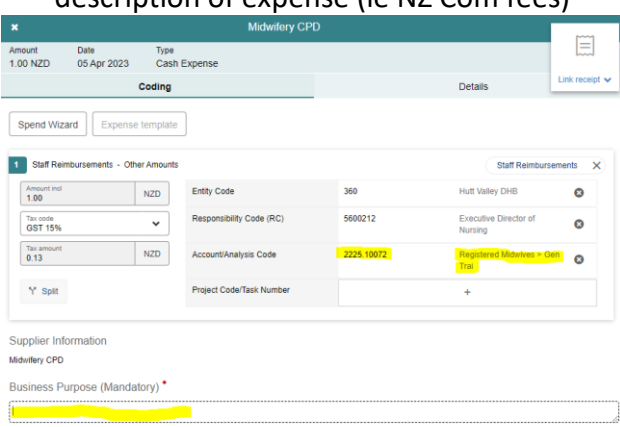
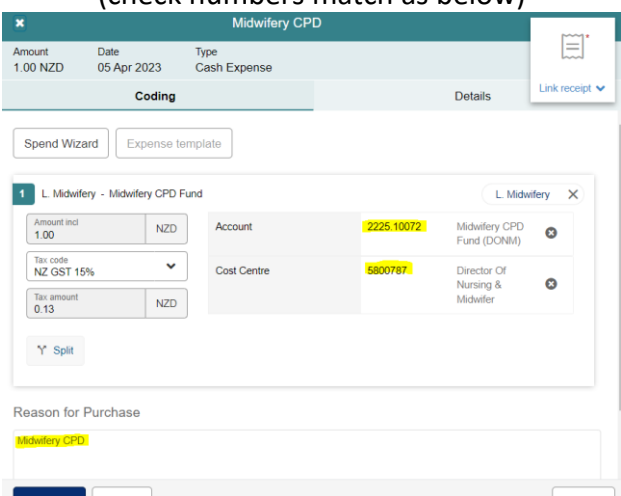
Hutt Valley	Capital Coast
<p>Scroll down and click on Staff Reimbursements</p> <p>Back</p> <p>What was this expense for?</p> <p><input type="text" value="Type in keywords like 'travel' or 'hotel'"/></p> <p>Staff Reimbursements Please select this questionnaire for all Staff reimbursement claims including Mileage claims.</p> <p style="text-align: right;">☆ ></p>	<p>Scroll down and click on L. Midwifery</p> <p>What was this expense for?</p> <p><input type="text" value="Type in keywords like 'travel' or 'hotel'"/></p> <p>L. Midwifery Midwifery</p> <p style="text-align: right;">★ ></p>

Hutt Valley	Capital Coast
<p>In Other Amounts box enter the total expense amount (incl tax)</p> <p>Staff Reimbursements</p> <p>Please select this questionnaire for all Staff reimbursement claims in</p> <p>Other Amounts <input type="text" value="NZD 0.00"/></p> <p>Please enter the amount of your claim. Staff Reimburs</p> <p>Allocated 0.00 NZD</p> <p>Remaining balance 1.00 NZD</p>	<p>In Midwifery CPD Fund box enter the total expense amount (incl tax). In comment add <u>Name of Supplier</u> (as listed on receipt).</p> <p>L. Midwifery</p> <p>Midwifery</p> <p>Midwifery CPD Fund <input type="text" value="NZD 0.00"/> Add a comment</p> <p>Midwifery CPD Fund (DONM)</p> <p>Allocated 0.00 NZD</p> <p>Cash expense total 0.00 NZD</p>

6: ENTER or CHECK THE COST CODE AND PURCHASE REASON

Ensure the appropriate cost code is entered, and reason for purchase:

- Hutt Valley: Entity **360** / RC **5600212** / Account **2225.10072** (leave project code/task no. blank)
- Capital Coast: Account **2225.10072** / Cost Centre **5800787**

Hutt Valley	Capital Coast
<p>Click on the box</p> <p>Account/Analysis Code <input type="text" value=""/></p> <p>A required code is missing.</p> <p>No favourite codes found. Click Search Cost Centre codes and add codes to favourites so you can quickly access them here.</p> <p>Search Cost Centre codes →</p> <p>Click on 'Search for cost code' and type: 2225.10072 press 'Search' – then select code. <i>Favourite to make it faster for next time</i></p> <p>2225.10072 Midwifery CPD Fund (DONM)</p> <p>Select Favourite Info</p> <p>In purpose write Midwifery CPD and description of expense (ie NZ Com fees)</p>  <p>Click update to save</p>	<p>Account and cost centre will pre-populate (check numbers match as below)</p>  <p>In 'Reason for Purchase' box write Midwifery CPD and description of expense (ie NZCOM fees)</p> <p>Click update to save</p>

You can save your expense as a draft and come back later to complete it, if you need.

7: CHECK THE TAX IS CORRECT

Tax code – this can be manually changed. Select NZ GST 15% for all costs incurred in NZD.
If you have an invoice in a foreign currency, select tax code N/A

8: ATTACH YOUR TAX RECEIPTS or PROOF OF PAYMENT and CHERWELL APPROVAL EMAIL

Have all your documents ready and saved on your computer.




Claims documents accepted are:

- Cherwell CPD approval email (*PDF must be attached – Cherwell step 1*)
- tax invoice/receipts
- proof of purchase / bank statement
- proof of foreign currency

Click on **Link Receipt**, GST invoice yes (if tax receipt) or no (if proof of purchase only) and click > **Image Library**.



Click on  and select each file. All documents should be showing in linked images tab

  Note: if you have saved an image previously, click on image library, click the document and press  to associate with your claim.

9: COMPLETE YOUR CLAIM

If you are satisfied with your new claim, you can now press **COMPLETE**.

Your claim is now with the Director of Nursing & Midwifery/Manager. They have the ability to approve, ask for further information, or to decline. Check your claim in FlexiPurchase to ensure you have not been asked for additional information. Once approved, you will be reimbursed through the payroll system (this may be at a different timing than your usual payday).

For queries contact:

Staff Reimbursements [CCDHB] RES-StaffReimburse@ccdhb.org.nz

Staff Accounts_Payable [HVDHB] RES-Accounts_Payable@huttvalleydhd.org.nz

FAQs:

I need more information assistance with my application or but I am not sure what to do?

Email Midwifery CPD (RES-MidwiferyCPD@ccdhb.org.nz) or discuss with your manager.

How do I delete a claim?

Refer to image on step six – click on OPTIONS, select delete claim. All linked images will be removed out of the system.

If your claim is already submitted to your approving manager, you can change your filters in the expenses tab to find your claim. Go to Expenses tab -> Filters -> change status to Pending approval -> Apply. Delete using the same method as incomplete claims.

Why do I get a blank screen when selecting Cash Expenses on the home page?

Please ensure you don't use Internet Explorer as your search engine for FlexiPurchase. It is no longer a trusted engine and will be retired in June 2022.

Why is my claim not approved?

Claims can take time to be approved, as some managers have a lot of claims to review. If after 4 weeks your claim is unapproved, reach out to Staff Reimbursements (Capital and Coast) / Accounts_Payable (Hutt) email. It is likely that there is an approving manager or claim error causing the delay.

My claim is showing the wrong cost centre, how do I change?

Unfortunately, you can't change the cost centre yourself. You will need to contact Staff Reimbursements (Capital and Coast) / Accounts_Payable (Hutt) email if you are getting the wrong cost centre.

Can I attach more than one document to my claim?

Yes, you most definitely can. Refer to step seven to learn how.

Why do I need to show proof of foreign currency conversion?

This is mainly for auditing purposes and another layer of proof. Even if it gets approved by your manager, it can be placed on hold by the FlexiPurchase administrators. You will be notified by Staff Reimbursements (Capital and Coast) / Accounts_Payable (Hutt) to provide further proof for your claim. It will remain on hold until satisfactory documents are provided.

I've forgotten my password, what do I do?

On the login page, you can go to the 'Forgotten your password' option. Insert your email twice as that is both your username and email. You should receive an automated email from FlexiPurchase to reset your password. If no response, please get in touch with Staff Reimbursements (Capital and Coast) / Accounts_Payable (Hutt)

I'm locked out of my account, what do I do?

Contact Staff Reimbursements (Capital and Coast) / Accounts_Payable (Hutt)

Midwifery CPD Committee and dispute resolution process

The committee reviews all requests for funding over \$1,000, where there is multiple requests for attendance at the same conference/study which may impact safe staffing, or in relation to dispute resolutions.

1. Membership

The membership of the committee includes:

- Director of Midwifery
- Two Midwife Manager representatives, at least one from each hospital site
- Two MERAS representatives, at least one from each hospital site

OR a person with authority to act as proxy by a member of the committee where they are unavailable. Each party shall be responsible for the appointment of its members.

2. Member responsibilities

- a) Monitor use of the CPD funds
- b) Consider applications for amounts in excess of \$1000 for any midwife in a financial year taking into account the likely demand on the fund in any given year. Applicants will be informed via email of the committee's decision following the meeting.
- c) The committee must maintain a standard reporting record that includes:
 - Full financial records detailing the level and use of expenditure,
 - Any declined applications and the reason for declination,
 - Any approved funding over and above the CPD pool, and
 - The reporting record is to be made available to MERAS on request.

1. Frequency

The meetings will occur quarterly in March, June, September and December.

2. Quorum

A quorum will have been achieved when a minimum of one representative from each party is present.

3. Meeting management

- a) Chairing responsibilities will include preparing and circulating the agenda and minutes, and will be rotated between committee members
- b) A standing agenda will be agreed at the first meeting with reference to this document
- c) A request for agenda items will be circulated two weeks before each meeting
- d) The agenda and relevant papers (including CPD expenditure and applications for consideration) will be circulated one week in advance of the meeting.
- e) Minutes, including decisions and agreed actions, will be distributed within one week of the meeting.

4. Dispute Resolution

Where agreement cannot be reached between parties at the meeting, or through other processes or structures, any party may choose to seek redress through the dispute resolution process outlined in the relevant collective employment agreement.

All disputes should be sent via email to MidwiferyCPD@ccandhvdhbs.org.nz

5. Associated links and documents

- a) Cherwell professional development application form: [click here](#)
- b) Flexipurchase expense reimbursement form link: [click here](#)