

## Continuing Professional Development (CPD) Fund for MERAS Midwives 2DHB

### Introduction

As an outcome of the Midwifery Employee and Advisory Services (MERAS) MECA each District Health Board (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.

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.

### 1. Fund criteria

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. 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:
  - I. 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)
  - II. External provider workshops or courses
  - III. Conference registration
  - IV. 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. Application for funding is through a two-part process

Follow the step-by-step instructions in Appendix 1, noting the following:

### Approval of application

- a) Applications must be made in writing using the approved Cherwell electronic application form available: [click here](#).
- b) The line manager will review leave balances and impact on service (if popular conference/event) and approve any funding applications from midwives within their \$1000 funding provision in any given year. Discussing with your manager is recommended prior to applying.
- c) Applications must be assigned to the account/cost centre for your main work location (Capital and Coast 0787-2546 / Hutt 212-2225-10072)
- d) Roster capabilities will be taken into account before a final decision on the funding application is made.
- e) 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.
- f) All applications will be considered and the outcome of that application advised via email.
- g) Dispute resolutions will be discussed at the Midwifery CPD Committee meeting (quarterly) unless a decision is required earlier.

### Reimbursement

- a) Midwives new to FlexiPurchase will be required to register online with the FlexiPurchase [www.FlexiPurchase.com](http://www.FlexiPurchase.com) for the DHB which they are employed.
- b) After you have received an approval email- midwives must complete the online FlexiPurchase application for reimbursement. All applications must contain:
  - a copy of the receipt and proof of payment
  - approval email
  - CPD account/cost centre indicating: Capital and Coast 0787-2546 / Hutt 212-2225-10072

Follow CPD FlexiPurchase instructions in Appendix 1.

### For reimbursement of study

- a) Following completion of study a certificate or other evidence of attendance must be uploaded to the Cherwell application within 3 months of course completion.
- b) Failure to provide this may result in a request for money to be repaid to the CPD fund.

### 3. Midwifery CPD Committee

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 2DHB
- 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](mailto:MidwiferyCPD@ccandhvdhbs.org.nz)


#### 5. Associated links and documents

- a) 2DHB Cherwell online application: [click here](#)
- b) 2DHB Flexipurchase online guide: Appendix 1
- c) 2DHB Flexipurchase online reimbursement link: [click here](#)

### APPENDIX 1

#### PART A: Obtaining an approval for MERAS midwifery CPD on Cherwell

Applications must be made in writing using the approved [Cherwell Electronic CPD Claim Form \(click here\)](#). See additional information on page 2 for approval criteria and process.

- Online Cherwell application form is used for both nursing and midwifery CPD, and MERAS midwifery CPD. Click on **MERAS Midwives** to ensure you are using the correct application / funding for MERAS midwives to prevent your claim being declined.
  - Paper applications are no longer used for midwifery CPD claims.
  - A Cherwell APPROVAL email is required before you use FlexiPurchase to claim reimbursement
  - Ensure you attach all documents relating to the claim, including invoices and receipts, and descriptions of purchases or courses by clicking on the attach button on the top tab
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- 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.

#### PART B: Creating an expense claim for MERAS midwifery CPD on FlexiPurchase: USER GUIDE

This guide is intended to provide a quick overview on how to create and correctly input an expense claim through FlexiPurchase, once your CPD has been approved by your manager and DOM/ADOM in Cherwell. It will cover a step-by-step process on entering your claim, attaching supporting documents, and common FAQs with answers.

- While the MERAS Midwifery CPD process is District wide, it is important that you put your claim through you're the hospital which you are employed at.
- First time users may need to email your local accounts team: [Staff Reimbursements \[Capital and Coast\]](#) or [Accounts Payable \[Hutt\]](#) requesting to be set up as an expense claimant. An employee ID and/or legal name can assist in locating your details. The team will give you your log in details once your account has been created.
- **FlexiPurchase payments are separate to Payroll/Salary payments.**



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

FlexiPurchase claim prior to approval, incorrect account/cost centre, NZCOM fees for more than the \$345 upper limit per annum (see above), claims for APC or expenses other than CPD, tax receipt / proof of purchase / approval documents not attached, claiming on another employees FlexiPurchase.

Follow the user steps below carefully.

**STEP ONE: OBTAIN & EMAIL RECEIPT (OR PROOF OF PAYMENT)**

At the time of purchase ensure you obtain a tax invoice and/or tax receipt from the supplier. If this purchase is 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.

To locate your supporting documents before starting your claim, we recommend having them saved in an open folder, ready for you to upload/drag and drop to your claim.

**STEP TWO: LOG IN**

**FlexiPurchase's website can be located at: [www.FlexiPurchase.com](http://www.FlexiPurchase.com)**

*See FAQ's at end of document if errors occur during this process.*

Use the following logon details:

**Username:** email address (eg. Your.Name@ccdhb.org.nz or Your.Name@huttvalleydhb.org.nz)

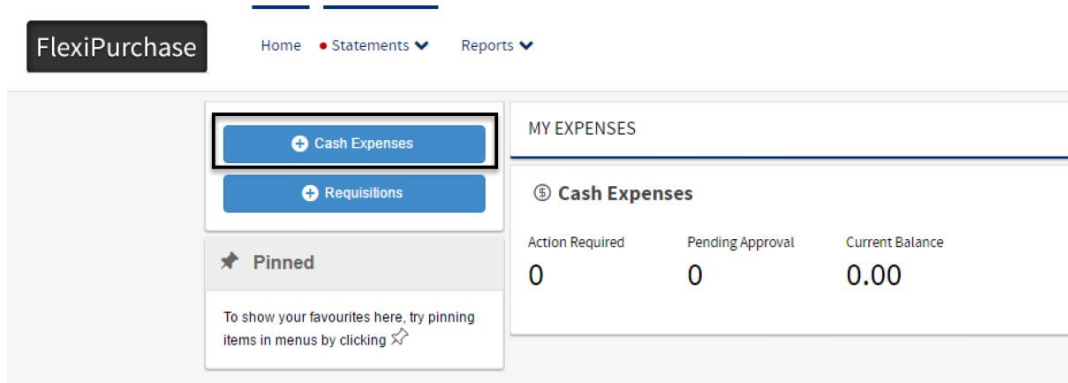
**Password:** Provided in welcome email / or use "forgot your password" option.



Hutt midwives will be provided with a unique MERAS MIDWIFE CPD FlexiPurchase logon.  
If you are unsure, message Accounts\_Payable [Hutt] to confirm.

**STEP THREE : CREATE EXPENSE CLAIM ON FLEXIPURCHASE**

Click on the blue button in the top left of your home page.



This will take you to your expenses tab.

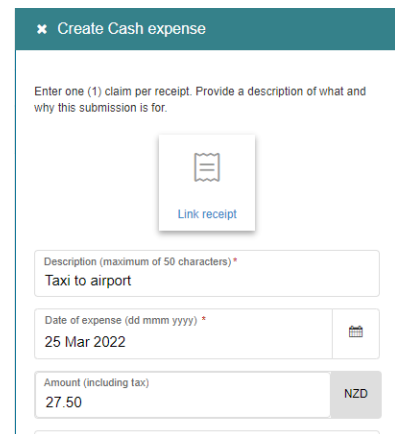


**STEP FOUR: ADD DESCRIPTION, EXPENSE DATE & AMOUNT**

Fill in the required fields in the Create Cash Expense section.

Enter the description: **MERAS Midwife CPD** with a brief description for what you are claiming e.g. NZCOM membership. Select the date for when you paid your expense and insert the expense amount.

Once you have entered the required details, you can proceed to the next step by selecting -> Next.



**STEP FIVE: CHOOSE RELEVANT SPEND WIZARD OPTION**

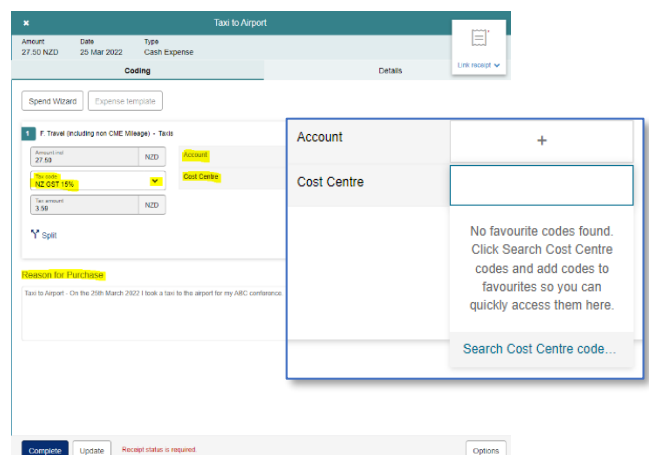
It's time to link your expense amount to the right account and cost centre. It is important that you choose the correct field.

Click **COST CENTRE / + / Search Cost Centre Code**.  
Search code value:

Capital Coast	click name then <b>SELECT 0787</b>
Hutt	click on name then <b>SELECT 212-2225</b>

Click **ACCOUNT / + / Search Cost Centre Code**. Search code value:

Capital Coast	click on name then <b>SELECT 2546</b>
Hutt	click on name then <b>SELECT 10072</b>



When you have selected both finished click **UPDATE**. *You can save your expense as a draft and come back later to complete it, if you need.*

## STEP SIX: CHECK THE ACCOUNT AND COST CENTRE ARE CORRECT

There are few things you must check before attaching a receipt and completing your claim.

- The cost centre matches the MERAS MIDWIFE CPD (Capital and Coast 0787-2546 / Hutt 212-2225-10072)
- 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
- Reason for purchase includes ‘MERAS CPD’ and description of expense

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## STEP SEVEN: ATTACHING RECEIPTS AND APPROVAL EMAIL (INCLUDING PROOF OF PAYMENT)

This step can be tricky.

- After you’ve checked your coding, attach linked documents by going to the top-right corner of your screen.
- Claims documents which are accepted are tax invoice/receipts/proof of foreign currency/bank statement and a copy of your email
- Select Image Library and this will open a pop-up window. This library is for you to upload, or drag and drop as many supporting documents as you may need. For drag and drop from your desktop folder, or you can left click on any document (in the image library) and select Link.

You will notice a ‘Linked Images’ and an ‘Image Library’ tab on this pop-up window. The Linked Images is what gets linked to your claim and is what your approving manager sees.

After you have attached all required documents, change the GST Invoice Obtained option to Yes..



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## STEP EIGHT: COMPLETING YOUR CLAIM

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

It is now sitting with your approving manager. They have the ability to approve, ask for further information, or to decline. Once approved, it will be reimbursed in the following Thursday pay run.

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### 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](mailto:RES-MidwiferyCPD@ccdhb.org.nz)) or discuss with your manager.

#### How do I delete a claim?

Refer to image on step six. You can delete a claim by selecting options in the bottom right corner and then delete. 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 (CCDHB) / 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 (CCapital 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:

**CCDHB: Staff Reimbursements/Accounts\_Payable [Capital and Coast]**

**HVDHB: Accounts\_Payable [Hutt]**