



2014 OFNHP Professional Education Fund Reimbursement Expense Form

REQUESTS FOR REIMBURSEMENT: Please see attached OFNHP Professional Education Fund policy for reimbursement guidelines and instructions. Proof of payment and grades/course completion are required. Requests must be submitted within **60 days** of class completion. For expenses that don't require completion, requests must be submitted within 60 days of payment.

Employee Name:	Employee ID#:	Tie-Line:	Date:
Position:	Facility:	Department:	Home/Cell Phone:

	Explanation of Reimbursement Requested	Date (start/end)	Amount
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
Total Reimbursement Amount Requested:			\$

I understand reimbursement(s) are subject to the provisions of the OFNHP Professional Education Reimbursement policy. I have read the instructions on the following pages for clarification before submitting this request. I certify that these expenses are true and correct to the best of my knowledge.

X _____
Employee Signature _____
Date

HRUSEONLY					
Date of Hire:	Active EE: <input type="checkbox"/> Yes <input type="checkbox"/> No	EE Group/Entity:		Coded Hours:	
Human Resources Signature:		TR Exhausted? <input type="checkbox"/> Yes <input type="checkbox"/> No TR Eligible? <input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Approved <input type="checkbox"/> Denied(see attached)	
TR Amount Paid: \$		TR Amount Unpaid: \$		Pay Period/Date:	
Union Amt Paid:	Pay Period/Date:	Amount Unpaid:	Overage Paid:	Overage Unpaid:	Pay Period/Date:

Send requests to: Tuition Reimbursement/HR/KPB-13

Instructions for Completing and Submitting Reimbursement form

- a. Fill out the form completely. Use “Explanation of Reimbursement” field to list course, seminar, books or other education expenses.
- b. Please send completed form along with proof of payment and proof of completion via inter-office mail to Tuition Reimbursement, Human Resources, KP-13. Reimbursement will be added to your payroll check as non-taxable income.
- c. KPNW Tuition Expense Reimbursement funds should be requested before union funds using the KPNW Tuition Expense Reimbursement Expense Form. Once KPNW Tuition Expense Reimbursement funds are exhausted, or if the requested expenses are not eligible under the KPNW Tuition Reimbursement Fund, request funds through the OFNHP Professional Education Reimbursement Fund.
- d. For further information, go to the My HR Portal online. Under the KP & Me tab, select the Career Development link, and then the Education Assistance link. You will find the current information and forms for the education programs available to you as a KP employee.
- e. Please note that the OFNHP Professional Education Fund is a reimbursement fund. The fund does not prepay education expenses.
- f. For questions, please email NW-HRServices@kp.org.

KPNW Tuition Expense Reimbursement Policy

Eligibility

Regular employees coded 20 hours or more per week, who have been employed with Kaiser Permanente on a continuous basis for one year or more are eligible for Tuition Expense Reimbursement. Temporary and on-call personnel are not eligible for the program.

Guidelines

1. The course or training must be taken from an accredited school, junior college, university, or other equivalent institution that has been accredited by the Western Association of Schools and Colleges. University extension correspondence and online courses are considered equal to any other college course.
2. Consideration may be given to non-accredited educational programs which are approved by a recognized management or professional organization. Please email NW-HRServices@kp.org or call the Education Coordinator at 49-4005 to confirm if the course you wish to take meets requirements for approval.
3. Reimbursement is offered up to \$600 per year. Please see below for eligible/ineligible expenses.
4. The courses or training may or may not carry credits. CME and CEU accredited courses are eligible.
5. There is no restriction on the number of courses eligible for reimbursement per school term.
6. Reimbursement will not be approved if other financial assistance (e.g., scholarships, GI Bill) is received for the course, degree, or certificate program.
7. Employees who take an unpaid leave of absence for the purpose of education, at any time during the course, degree, or certificate program, are not eligible. The eligibility of employees, who take a medical, military, parental or family leave any time during the course of study, shall be subject to review by the Education Coordinator.
8. Kaiser Permanente will not reimburse educational expenses if an employee resigns or is terminated prior to completion of the course, degree, or certificate program.

Eligible Expenses for KPNW Tuition Reimbursement Fund

Expenses which are covered include:

- Seminars, workshops, conferences, and educational meetings.
- Course tuition, required entrance/registration fees, required textbooks and laboratory fees.

Ineligible Expenses for KPNW Tuition Reimbursement Fund

Expenses which are not covered include, but are not limited to:

- Hotel accommodations and meals while attending conferences/meetings.
- Parking, mileage, transportation to and from place of instruction.
- Cost of periodicals, reference books, supplies, uniforms and equipment.
- Computer software.
- Professional association registration (funds may be available through department budgets or union sponsored programs such as OFNHP Professional Unit Education Fund).
- Courses and training related to: recreational activities, music, art, dance, religion, physical fitness, drama, hobbies, etc.

OFNHP Professional Education Reimbursement Policy

Eligibility

- Employees working in a regular employment status are eligible for the education program.
- **Employees coded .5 FTE or greater shall be eligible for reimbursement of an amount up to \$1200 per year, prorated based upon his/her FTE.**
- Probationary employees will accrue but may not access funds until completion of their probationary period. New hire employees, including interregional transfers with twenty (20) hours or greater per week, shall be considered probationary during the first one hundred eighty (180) days of their employment.
- An employee who changes to a new discipline will be on probation for one hundred eighty (180) days in the new position.

Guidelines

- Employees must submit educational expenses for reimbursement within 60 (sixty) days of incurring the expense. **Expenses more than 60 (sixty) days old will not be processed.**
- January and February are the only months in which expenses for the prior year may be reimbursed. Unused funds equal to your eligible hours are rolled over to the following year with a cap of twice your annual funds.
- The funds are available for use until 5:00PM December 31, 2014 and expenses must be received by 5:00PM on February 28, 2015. You will not be paid from 2014 funds if receipts are dated after December 31, 2014, they will apply to your 2015 fund balance.

Please see chart below to determine amount of funds available to you.

AC Fund Disbursement Chart		
Full Time Employee	Hired Between January 1–June 30	Hired Between July 1–December 31
Lessthan 0.5FTE	Upto \$600 depending on residual funds available	Upto \$300 depending on residual funds available
.5FTE(20)	\$600	\$300
.55(22)	\$660	\$330
.6FTE(24)	\$720	\$360
.65(26)	\$780	\$390
.7FTE(28)	\$840	\$420
.75(30)	\$900	\$450
.8FTE(32)	\$960	\$480
.85(34)	\$1020	\$510
.9FTE(36)	\$1,080	\$540
.95(38)	\$1140	\$570
1FTE(40)	\$1,200	\$600

Eligible Expenses for OFNHP Professionals Education Fund

All expenses, with the exception of airfare, must be submitted at onetime (i.e. hotel, conference fee, rental car, etc.) We cannot process items for an event that are turned in separately. **Confirmation of attendance or copy of Certificate of Completion must be included.**

1. Professional Practice License fee for initial license and renewal (secondary license not covered)
2. Board Certification/Recertification fees (Including testing fees)
3. Continuing professional education (CPE, CME, CEU)
4. Professional development seminar or conference fees and related expenses
5. Professional organization membership dues
6. Professional publications
7. Textbooks and computer software (educational and reference only)
8. Travel expenses
 - a) Airfare
 - b) Hotel accommodations
 - c) Mileage reimbursement when using own vehicle (at current IRS rate, please provide Google Maps route indicating total miles)
 - d) Auto rental fees and gas for rental vehicle (small and midsize vehicles only)
 - e) Meals while attending conferences or seminars
 - f) Parking fees
 - g) Taxi fares
 - h) Childcare expenses which allow a bargaining unit member to attend a conference

Ineligible Expenses for OFNHP Professionals Education Fund

Business Expense and Training Reimbursements: The following expenses will be reimbursed as business expenses **and do not** apply towards the Education Fund. To assure that these items are processed appropriately, submit them **separately** from all education fund expenses.

a. DEA license fees

To prepay your DEA license renewal, submit a check request form and copy of your renewal notice to Accounting/Northwest Permanente (NWP)/KPB-15. **Please note, you must allow 4 weeks advance notice.**

OR, if you have already paid, submit a Business Expense Form to your supervisor for authorization, and then send to Accounting/Northwest Permanente (NWP)/KPB-15 for reimbursement. **Please include a copy of your receipt.** For questions, please contact Kim Calcagno in NWP Accounting.

b. Professional Practice License Fees for Secondary Licenses

Submit a Business Expense Form and copy of your receipt to your supervisor for authorization, and then send to Accounting/Northwest Permanente (NWP)/KPB-15 for reimbursement.

Secondary licenses will not be covered unless they are mandatory.

For questions, please contact Kim Calcagno in NWP Accounting.

c. Professional Practice License Change Fees

This includes license fees related to practice location changes, address changes, etc. If you change locations mid-cycle, submit a Business Expense Form to your supervisor for authorization, and then send to Accounting/Northwest Permanente (NWP)/KPB-15 for reimbursement.

d. Administrative Leave Expenses.

e. Advanced Life Support Certification fees if required by employment position.

f. Certification for neonatal resuscitation fees if required by employment position.

- g. Professional recertification and/or additional certifications required by the Employer.**
- h. Employer mandated training not listed above.**
- i. Equipment (blackberry devices, computers, stethoscopes, etc.)**

If you feel that you require an item in order to perform your work properly, you may submit a Business Expense Form to your department for possible reimbursement.

A copy of the following is required for reimbursement (please keep your originals):

Proof of Payment (for all items):

- **Copy of receipt (credit card or cash)**
- **Or Copy of cancelled check (front & back showing proof of payment)**
- **Or Copies of bank or credit card statements (black out your account #)**
- **Or Copy of E-confirmation of payment**

AND

Proof of Completion/Attendance (for conferences, seminars, and classes):

- **A copy of Certificate of Completion showing CME or CEU credits**
- **Or Copy of Certificate of Attendance**