



2019 OFNHP Technical Education Fund Reimbursement Expense Form

REQUEST FOR REIMBURSEMENT: Please use this OFNHP Technical Education Fund form for reimbursement guidelines and instructions. Proof of payment and grades/course completion are required for all submissions. OFNHP Technical reimbursement requests must be submitted within **60 days** of course completion.

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.			
Total Reimbursement Amount Requested:			\$

By signing this form, I understand reimbursement(s) for educational funds are subject to the provisions of the OFNHP Technical Education Reimbursement policy; that I am acknowledging I have read the instructions on the following pages prior to submitting this request; and that I certify that these expenses are true and correct to the best of my knowledge.

X _____
 Employee Signature _____
 Date

HR USE ONLY					
TR Amount Paid: \$		TR Amount Unpaid: \$		Pay Period/Date:	
Human Resources Signature:				<input type="checkbox"/> Approved <input type="checkbox"/> Denied (see attached)	
Union Amt. Paid:	Pay Period/Date:	Amount Unpaid:	Overage Paid:	Overage Unpaid:	Pay Period/Date:

COMMITTEE USE ONLY (If Applicable)	
<input type="checkbox"/> Approved Amount: \$	<input type="checkbox"/> Denied
Education Committee Rep. Signature: _____ Date: _____	
For End of The Year Overage Approval	
Amount Approved: \$	
Education Committee Rep. Signature _____ Date: _____	

Send requests via Fax: 971-404-3421/ Email: NW-Tuition-Reimbursement@KP.org

KPNW fund is now Online on MyHr → Employee Actions → Tuition Reimbursement

Eligibility

All current KP OFNHP Technical Union members with six (6) months of continuous service are eligible.

Guidelines

1. **Maximum Amount Covered Per Year:** The maximum amount covered for an OFNHP Technical Union member is \$400 per employee, per year, until the funds are exhausted. If funds remain at the end of the year, additional reimbursement may be considered for employees who applied for expenses over the initial \$400.00 maximum.
2. **Eligible Programs:** Educational programs which are relevant to the jobrelated needs of the employee and to the health care needs of Kaiser Permanente members are eligible. This includes continuing education, professional development, education for certification and/or licensure and personal development.
3. **Eligible Expenses for the OFNHP Technical Education Fund:** Eligible expenses include registration fees for seminars, workshops and conferences, books for approved classes, expenses to bring a guest speaker in-house, reasonable travel, auto fuel (must provide receipts), lodging, sitting for license board exams or certification exams. May also include tuition reimbursement in excess of funds available under the KPNW Tuition Reimbursement Policy.
4. **Ineligible Expenses for the OFNHP Technical Education Fund:** Ineligible expenses include meals, hotel incidentals, telephone calls, rental cars, wages (reimbursement for time lost), child care, parking fees, mileage, injured workers training as covered by Workers' Compensation or outside insurance, professional dues and subscriptions, annual license fees or dues, retraining as part of RIFs.
5. **Reimbursement applications will be forwarded to your OFNHP Technical Education Fund committee member to determine final approval.**
6. After submitting your completed and signed OFNHP Technical Education Fund Reimbursement form, along with all supporting documentation, please review your pay statement to confirm your tax free reimbursement amount. *Note: Funds may not appear on your pay stub for **up to 2-4 pay periods** following a completed and processed submission.*
7. All requests for the 2019 calendar year, including requests for expenses in excess of \$400.00, must be submitted by February 1, 2020, to be considered for end of year expenditure. December education expenses need to be pre-authorized by your Committee Representative.
8. **KPNW Tuition and Travel Expense Reimbursement** is now available **online** on **MyHr→Employee Action→ Tuition Reimbursement**. The application is filled out electronically, and your documents are uploaded to the site for processing

Appeals

Send your written appeal to your Committee Representative who will present the appeal to the OFNHP Technical Education Committee.

OFNHP Technical Education Committee Representatives**Marilyn Cony**

PT/OT-KSMC

E-mail: Marilyn.C.Conny@kp.org

Physical Therapy Assistants, Certified Occupational Therapy Assistants, RMTC Cardiac Surveillance, Dialysis, Operating Room, Orthopedic Technicians, Surgical Assistants

AnnDee C Frostad

Optical/Sleep

E-mail: [AnnDee C Frostad@kp.org](mailto:AnnDee.C.Frostad@kp.org)

Dispensing Optician, Contact Lens, Optometry Assistant, Optical Lab, Medical Lab Technicians, Polysomnography, DME Assistants, Pulmonary Function Therapists, Bronchoscopy Specialists, Asthma Case Managers, Oxygen Case Managers

Ivan C Ames

Respiratory

Email: Ivan.C.Ames@KP.org

Respiratory Therapists,

Bridgitta K. Sanchez

Dental Laboratory-NISB, Histology Technicians,

E-mail: Bridgitta.K.Sanchez@kp.org

Dental Lab Specialists

Checklist for KPNW Tuition Reimbursement and Union Education Reimbursement Funds

1. Have you exhausted your KPNW Tuition Reimbursement Funds (for eligible education expenses) for the current year?
 - Yes. Please use your correct Union group and year reimbursement form.
 - No. Please submit your request on an online KPNW Tuition Reimbursement form.
2. Are you using the correct form for your Union group and the current year's form?
 - Yes
 - No. Please submit your request on the correct Union group and year form. If you do not submit your request on the correct form, your request will not be approved and paid.
3. Please ensure you are following the deadlines for submission as follows:
 - KPNW Tuition Reimbursement – 90 days from date of class completion
 - OFNHP Technical Employees – 60 days from date of class completion

Other submission reminders:

- Fill out the form completely. Use “Explanation of Reimbursement” field to list course, seminar, books or other education expenses.
- Print your name and employee number (starts with 00) on all sheets you are submitting, including your supporting documents (proof of payment and completion/attendance/grades).
- Remember to date and sign your request form.
- Fax/email your documents and retain your originals.
- Acceptable forms of proof of payment:
 - Copy of receipt (credit card or cash)
 - Copy of cancelled check (front & back showing proof of payment)
 - Copy of bank or credit card statement (black out your account number)
 - Copy of e-confirmation or payment.
- Acceptable proof of completion/attendance (for conferences, seminars and classes):
 - Copy of Certificate of Completion showing CME or CEU credits, grades
 - Or Copy of Certificate of Attendance
- Send completed form along with proof of payment and proof of completion via fax **971-404-3421**.
- Reimbursement will be added to your payroll check as ***non-taxable income***.
- All Tuition reimbursement funds are intended to be a reimbursement. The Education Coordinator will review and determine eligibility of courses.
January and February are the only months in which expenses for the prior year may be reimbursed