

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

As an outcome of the Midwifery Employee and Advisory Services (MERAS) SECA each Health New Zealand | Te Whatu Ora district is required to commit a pool of funding based on \$1,000 per MERAS members (headcount), for each financial year (from 1 July to 30 June). This funding pool is to enable midwifery members to meet approved professional development requirements.

Funds can be accessed through a CPD application process by MERAS members and fund administrators. Unused funds will remain available for use for up to a further twelve (12) months following the end of the financial year.

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

### Contents

Before I start – what do I need to know? .....	1
What will the MERAS CPD funding cover? .....	1
STEP 1: Applying for MERAS CPD funding Cherwell .....	2
STEP 2: Applying for reimbursement of expenses FlexiPurchase .....	3
Midwifery CPD Committee and dispute resolution process .....	9

### Before I start – what do I need to know?

#### CPD Funding is granted through a two-step process:

- Step 1 Apply to access CPD funding (CHERWELL):** using a MERAS midwives professional development fund application e-form: approved by your manager & midwifery clinical leads.
- Step 2 Request fund reimbursement (FLEXIPURCHASE):** *Once you have received an approval email from the CPD fund*– complete staff reimbursement e-form: approved by DOM/manager – FlexiPurchase

### What will the MERAS CPD funding cover?

Where the midwife is an applicable member, the following can be applied for:

- a) **NZCOM Membership Fees:** the cost of membership on presentation of GST receipt detailing funds paid. Where the employee works for another organisation, or in private practice (i.e. LMC), the fund will only be required to pay the amount on a pro-rata basis, for a membership rate no higher than an employed midwife fee. *Receipt can be downloaded from the NZCOM midwife portal.*

- b) **Courses and conferences:** funding towards any courses/programmes that are relevant to the individual's professional development within healthcare and related to the midwifery scope of practice, position profile or career development.

This includes:

1. Conference registration, workshops or courses
2. 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)

- c) **Costs related to travel and accommodation:** to attend professional development opportunities. A fund limit will be reviewed alongside district Staff Travel and Sensitive Expenditure policies ([click here](#)). ie. accommodation of \$200 (incl GST) max per night within NZ.

- d) **Text books and research magazines:** funding for subscriptions or purchases that are relevant to the individual's professional development within healthcare and related to the midwifery scope of practice, position profile or career development

Funds may also be applied, to support the midwifery profession with professional development, education and wellbeing opportunities. This may include funding for guest speakers on a topic relevant to midwifery / maternity and group professional development education sessions. If you wish to apply for this purpose, please contact the Director of Midwifery prior to application.

The Quality and Leadership Programme (QLP) funding will still be accessible to midwives, through a separate application process.

### STEP 1: Applying for MERAS CPD funding **Cherwell**

- All applications will be considered and the outcome advised via email.
- Discuss with your manager if leave is required for your claim.
- Before approving, your line manager will review leave balances, impact on service/rostering (for popular conference/event).
- Where leave is required, roster capabilities will be taken into account.
- 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 until your line manager advises you have been selected.
- For courses or conferences funded where pre-approval has been granted in Cherwell prior to study – a certificate or other evidence of attendance may be requested on course completion. Failure to provide this may result in a request for money to be repaid to the CPD fund.
- If you have applied for funding from another source this must be declared (regardless of outcome of the funding application and 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.
- Funding above the fund balance may be granted on application but requires Midwifery CPD Committee or fund administrator approval.
- Dispute resolutions will be discussed at the Midwifery CPD Committee meeting (quarterly) unless a decision is required earlier.

1. Login to [Citrix desktop](#) with your work login
2. Open the [CPD Funding Application Form \(CHERWELL\)](#) to apply for funding.  
*Copy link into Google Chrome (if link doesn't open properly)*
3. Click on **Start New Application**
4. Click **MERAS Midwives** button to change form to MERAS CPD Application (or you will be declined by NZNO funding team). *These buttons look very similar so it pays to double check.*
5. Complete each part of the form, ensuring you have all supporting documents ready before starting your application – including:
  - **Conference / course information** date, location,
  - **Details of purchase**
  - **Tax invoice and/or tax receipt** downloaded/sent at the time of purchase.  
*See 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.  
*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.*
  - **Proof of foreign currency conversion:** if the tax invoice/receipt is in a foreign currency, your expenses should be claimed in Cherwell for the NZ\$ amount. *Screenshots of the actual bank transactions with currency conversion are required to show conversion rate to NZD amount.*
6. Submit to receive a **SUBMISSION EMAIL**, which your manager and midwifery leads will review.
7. Once approved you will receive an **APPROVAL EMAIL**. *This is required before you complete a FlexiPurchase expense claim.* Print email to 'Microsoft print to PDF' and save file on your computer ready to upload with your reimbursement claim.

## STEP 2: Applying for reimbursement of expenses **FlexiPurchase**

To ensure your reimbursement is paid, please ensure the following:

- The approval email and tax receipt/proof of payment (and foreign currency conversion where required) are attached to your FlexiPurchase claim.
- You have used the correct account and cost centre.
- Your claim is not for APC, MSR or expenses which are not covered by MERAS CPD.
- Claims made for another staff member on your FlexiPurchase account.
- If you have difficulty applying for your reimbursement - speak to the Midwife Clinical Educators, Midwife Clinical Coaches, Midwife Manager or email [MidwiferyCPD@ccdhb.org.nz](mailto:MidwiferyCPD@ccdhb.org.nz)

**1: Compile your approval email, RECEIPT (OR PROOF OF PAYMENT)**

All applications must contain appropriate documentation to ensure you will be paid:

1. A copy of your **Cherwell CPD application approval email** (scan or print as PDF to attach).
2. Obtain a **tax invoice and/or tax receipt** at the time of purchase. If an online purchase, ensure you are emailed a receipt. *For tax invoice/receipt requirements as specified by IRD, see this information on the IRD website: <https://www.ird.govt.nz/gst/tax-invoices-for-gst>*
3. **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.
4. **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](http://www.FlexiPurchase.com)

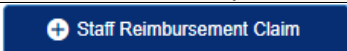
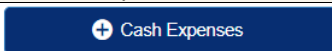
A FlexiPurchase login is required for reimbursement of funds. You should receive this after your start date. If you have not received a username and password / or have forgotten it, contact Staff Reimbursements team at:

- Hutt Valley [RES-Accounts Payable@huttvalleydhb.org.nz](mailto:RES-Accounts_Payable@huttvalleydhb.org.nz)  
For Hutt Valley staff –ensure you state login is for MERAS CPD Flexipurchase only.
- Capital Coast [RES-StaffReimburse@ccdhb.org.nz](mailto:RES-StaffReimburse@ccdhb.org.nz)

**3: CREATE A NEW CLAIM IN FLEXIPURCHASE**


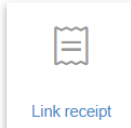
Click on the button below to create a new expense claim (or click expenses to view a partially completed claim).

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.

<i>Hutt Valley</i>	<i>Capital Coast</i>
	

**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><b>* Create Staff Reimbursemen...</b></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...<a href="#">Read more.</a></p> <p> 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><b>* Create Cash expense</b></p> <p>Enter one (1) claim per receipt. Provide a description of what and why this submission is for.</p> <p> 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 <b>Staff Reimbursements</b></p> <p>&lt; Back</p> <p>What was this expense for?</p> <p>Type in keywords like 'travel' or 'hotel'</p> <p><b>Staff Reimbursements</b> Please select this questionnaire for all Staff reimbursement claims including Mileage claims.</p> <p>☆ &gt;</p>	<p>Scroll down and click on <b>L. Midwifery</b></p> <p>What was this expense for?</p> <p>Type in keywords like 'travel' or 'hotel'</p> <p><b>L. Midwifery</b> Midwifery</p> <p>★ &gt;</p>

Hutt Valley	Capital Coast
In Other Amounts box enter the total expense amount (incl tax)	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><b>Staff Reimbursements</b></p> <p>Please select this questionnaire for all Staff reimbursement claims ii</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 <b>0.00 NZD</b></p> <p>Remaining balance <b>1.00 NZD</b></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 <b>0.00 NZD</b></p> <p>Cash expense total <b>0.00 NZD</b></p>

**6: ENTER or CHECK THE COST CODE IS CORRECT, AND PURCHASE REASON IS WRITTEN**

Check the cost codes are correct, 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><a href="#">Search Cost Centre codes →</a></p> <p>Click on 'Search for cost code' and type: <b>2225.10072</b> 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>

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

**7: CHECK THE GST / TAX CODE IS CORRECT**

GST / Tax – 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 ALL RELEVANT DOCUMENTS**


*NOTE: Have all your documents ready and saved on your computer.*

**Claims require ALL of the following documents:**


1. Cherwell CPD approval email (*PDF must be attached – Cherwell step 1*)
2. Tax invoice/receipts  
or Proof of purchase / bank statement
3. Proof of foreign currency rate (if invoice/payment in 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  Upload 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  Link 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 Midwifery or your Manager. They have the ability to approve, ask for further information, or to decline.

Check back in a few days 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](mailto:RES-StaffReimburse@ccdhb.org.nz)

Staff Accounts\_Payable [HVDHB] [RES-Accounts\\_Payable@huttvalleydhb.org.nz](mailto:RES-Accounts_Payable@huttvalleydhb.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](mailto: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 or the Midwifery Lead (in line with delegated authority)
- ☑ 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) Cherwell professional development application form: [click here](#)
- b) Flexipurchase expense reimbursement form link: [click here](#)