

CAROLINA FAMILY HEALTH CENTERS, INC.

PROCEDURE

TITLE: HR-700.01 Continuing Education Allowance

EFFECTIVE DATE: February 5, 2025

SECTION: Human Resources

REFERENCE POLICY: HR-700 Wages and Salary

RESPONSIBLE CHIEF OF STAFF: Chief Operating Officer

RESPONSIBLE COMMITTEE: Employee Investment CIT

REVIEWED: 07/02/2025

I. PURPOSE

The purpose of this procedure is to outline the provision of continuing education allowances for staff at Carolina Family Health Centers, Inc. (CFHC, Inc.).

II. PROCEDURE

All employees at CFHC, Inc. are offered a continuing education allowance as a benefit of employment to maintain their credentials and enhance their job-related skills and knowledge. Continuing education **day allowance** and **dollar expenditure** limits are detailed, by level, within the Wage and Salary Program. Refer to *HR-700 Wage and Salary Program*.

Staff are not allowed to use their continuing education day allowance and dollar expenditures during their probationary period. Once a staff person gives a notice of employment termination with CFHC, Inc., they forfeit any unused day allowances unless they were previously approved and any dollar expenditures unless the charge for such expenditure was incurred prior to the date of the notice. Continuing education day allowances that were approved prior to giving notice of termination of employment do not count towards the required days worked during the notice period.

Staff email the Chief Operating Officer (including their Supervisor) to verify their allocated **day allowance** and **dollar expenditure** limits. Both the days and dollar expenditure limits increase with the tenure of the employee.

Day allowances and **dollar expenditures** are based on fiscal year (July 1- June 30) allotments except for contract staff, whose balance is set based on the anniversary date of their contract. Day and dollar allotments unused at the end of the fiscal year or by the contract anniversary date are forfeited.

The educational opportunity must be pertinent to the staff member's role and responsibilities at CFHC, Inc. and enhance the employees' professional knowledge and skills. Continuing education days or dollar expenditures cannot be used for college or university tuition reimbursement or classroom participation.

Day Allowance covers travel time to and from the event and days in attendance as defined under *FIN-134.04 Compensation of Travel*. Vacation benefits can be used upon approval of the supervisor if the **Day Allowance** does not cover the needed amount. If travel to or participation in continuing education occurs over the weekend, CFHC, Inc. allows the equivalent number of hours to be used as a **Day Allowance** within the regularly scheduled work week for that travel or participation time. Staff is not to be granted compensatory time for travel or participation in continuing education.

Example: Mary flies to California on Sunday to attend a conference on Monday, Tuesday, and Wednesday. She flies back home after the conference on Wednesday night. Mary will not be given comp time for her travel time on Sunday or for her travel time on Wednesday night. She can take a continuing education **day allowance** on Thursday (for Sunday's travel) if she has additional unused days.

Staff are allowed to use **Day Allowance** to attend *live* webinars or teleconferences from home as long as participation from home does not impact attendance or learning. Staff are not allowed to use **Day Allowances** to listen to *recorded* podcasts/webinars unless the recorded podcast/webinar provides a certificate of attendance and is 6 hours or more in duration. Provider staff can utilize administrative time for learning opportunities less than four hours in duration or listen to them during their personal time. Staff who wish to participate in live webinars or recorded webinars at work must go through the approval process and ensure that their schedule is blocked. Staff do not attend or listen to learning opportunities when they are scheduled in the clinic and an area of patient care.

Dollar Expenditures that are eligible for reimbursement include:

A. Business-related travel expenses:

- Registration fees
- Mileage
- Food
- Transportation
- Parking fees
- Lodging

B. Other education purchases

- Certification or board examination fees
- Textbooks (that offer CE credits or assist in preparation for board certification or other professional certifications)
- Medically relevant education applications or subscription podcasts (e.g., AudioDigest)

Staff reference *FIN-134.01 Reimbursement of Business-Related Expenses* and *FIN-134.02 Mileage Reimbursement* for more information on how these categories are defined and the restrictions that apply.

Educational applications and subscriptions to educationally relevant podcasts fees cannot be combined with incentives (i.e., monetary incentives, gift cards, or other non-educationally based incentive items) as these are taxable income.

Dollar Expenditures cannot be used to purchase computers or other electronic devices. Refer to *FIN-134 Business-Related Expenses and Compensation*.

Expenditures are applied to the employee's balance on the date they are reimbursed. For example, if an employee attends a conference in June, but the lodging and food expense is not reimbursed until July, the start of the new fiscal year, the expenditure is applied to the employee's balance for the new year. Any expense incurred above the allotted dollar expenditure amount is the employees' responsibility. However, if the staff person is out of dollar expenditures for the current year and reservations are made for the following year, the expenditure is applied to next year's balance.

Staff complete the *Continuing Education Request* form (see attachment) to obtain permission to attend the training. Staff must get approval from their supervisor to use continuing education days and dollar expenditures. Staff must submit their request at least 45 days in advance of the training for travel that requires an overnight stay or travel by air or train. Failure to ensure that the request is sent in a timely manner may lead to a denial. Additionally, denials may occur depending on staffing levels and the impact it may have on patient care.

The employee must document on the form their name and date of the request; their current day and expense allowance and balance; the name of the conference, training, or examination; the estimated cost; the destination; mode of transportation; and departure and return date. The employee attaches the training agenda, and copies of proposed air/train fare and hotel room rates, if applicable. Once completed, the form is given to the supervisor for approval. For any overnight travel or travel requiring an alternative mode of transportation (plane, train, or rented automobile), approval is required by both the immediate supervisor, department Chief, Chief Financial Officer, and Chief Executive Officer.

Once approved, the employee is notified via email by their supervisor (or last signing supervisor), and a copy of all forms is sent to the Administrative Assistant–Operations. The administrative assistant verifies the meal per diem rate and the day and expenditure balance by initialing the form. He/she notifies the employee and his/her supervisor and Chief of Staff (if different from the direct supervisor) of the approval. The supervisor notifies the HIT Associate if schedules need to be blocked. If the request is denied by the CEO, he/she notifies the department Chief and they communicate this to his/her staff persons.

Employees are responsible for making their own reservations; this includes but is not limited to booking airfare, reserving their room, and paying for conference registration. No reservations are made until the travel request is approved. If the travel request is denied and the employee has made reservations, the employee is responsible for canceling the reservations and is responsible for any costs incurred.

The employee is responsible for requesting the appropriate time off in the timekeeping system and if applicable, ensuring his/her patient schedules are blocked.

Staff are allowed to have guest(s) accompany them when an overnight stay is planned, however, the guest(s) must not interfere with the staff member's attendance, participation, or learning. CFHC, Inc. is not responsible for guest(s) safety and welfare and is not responsible for expenses associated with the guest(s).

Any employee who is involved in an accident while traveling on business must promptly report the incident to his/her immediate supervisor and Human Resources. The supervisor must complete an incident report; refer to policy *RM-101 Incident Reporting*.

Staff follow *FIN-314.01 Reimbursement of Business-Related Expenses* to obtain reimbursement for costs incurred.

III. ATTACHMENTS

- *Continuing Education Request form*