

PROFESSIONAL DEVELOPMENT FUND FORM

Below are instructions on how to effectively employ the Professional Development Fund (PDF). PDF is a contractual benefit under Section 12.1 Professional Development Fund of the MOU. According to RNPA's agreement with the County, a negotiated sum of monies is allocated to this fund every fiscal year beginning July 1 and closing June 30.

This fund can be utilized for education, costs related to traveling (mode of travel, lodging, food, etc.), certification and licensure (BRN License) reimbursement.

Individual applications are funded on a matching basis: 25% by the nurse and 75% by the County, and up to a maximum County contribution of \$400.00 per nurse, per fiscal year. Requests for PDF must relate to the nurse's job or one to which the nurse could reasonably aspire within the County service.

There are two forms recognized in accessing Professional Development Fund reimbursement; this form which is entitled Professional Development Fund Form and can be used for reimbursement costs listed above and is available through RNPA website or the Employee Development (ED) website. The second form is the Licensure Form, and is available through your Manager. All instructions for Licensure are outlined on that specific application.

Please note: Tuition Reimbursement is a separate fund and the online form is available on the ED website.

Below are instructions on how to apply for Professional Development Fund reimbursement for all costs except Licensure.

1. Obtain a form from RNPA. Complete the application thoroughly. Incomplete or incorrect applications will not be processed and will be returned to the applicant.
2. All applications are processed on a "first come, first served basis."
 - **The RNPA office must receive applications at least ten (10) working days prior to the commencement of the class.**
 - **If traveling out of the 48 contiguous states submission to RNPA must be Twenty (20) working days prior to travel date so it can be processed by ED and the County Executive's Office.**
3. Please attach a copy of the **flyer/pamphlet** that includes the following class information:
 - a) Description, b) Date(s), c) Location, d) Cost of registration and required material(s).
4. Keep copies of all documentation submitted for PD funding.
5. Submit the **original signed application** in person or by U.S. Mail to the RNPA office.

RNPA will send you an approval letter along with a Receipt Itemization Form. To ensure reimbursement, the Receipt Itemization Form must be completed and receipts representing the cost must be submitted to RNPA within two months after completion of the class or conference.

Usual proof of payment includes:

- 1) Copy of front and back of canceled check.
- 2) Copy of charge slip with imprinted name of vendor, date, and cost.
- 3) Copy of cash receipt with name of vendor, date, amount, and item.
- 4) Copy of bill showing a "zero balance due."
- 5) Copy of itinerary showing a "zero balance due."
- 6) Copy of airline ticket.

Receipt must be legible, accurate, and complete.

Allowable Expenses

Allowable expenses shall include, but not be limited to:

Class(es), conferences, and seminars; tuition not covered by the Tuition Reimbursement Program; required books and materials; expenses for travel out of Santa Clara County including transportation, meals, lodging, car rental, etc.

Registration

The amount shown on the flyer, pamphlet, class schedule, etc.

Hotel/Lodging

Hotel/lodging expenses for conferences, seminars, etc. Reimbursement will be provided for lodging for nights before when travel time exceeds two hours from the work site.

Example:	San Francisco one day class San Francisco two days class	No hotel/lodging. Hotel/lodging reimbursable for the night in between class days. Class is Monday, Tuesday, lodging will be paid for Monday night.
Example:	San Diego one day class San Diego three days class	Hotel/Lodging paid for night before the class. Hotel/Lodging paid night before and two days of class total three reimbursable days. Class is Monday, Tuesday, and Wednesday. Claim Sunday, Monday, and Tuesday lodging are reimbursable.
Example:	Sacramento one day class or more	Hotel/Lodging reimbursable for the night before and in between class days. Class Monday, Tuesday, lodging would be paid for Sunday, Monday nights.

Your hotel bill is required as proof of cost. The date(s) of your stay must be listed. The single occupancy rate will be paid. Double occupancy rate will be divided in half if room is shared with another person. Telephone calls, movies, or other extraneous costs are not reimbursable. Proof of payment must also be included. Therefore, make sure your bill shows a "zero" balance due or submit a credit card statement or charge slip showing the date(s) and hotel name. If you are sharing a room, you may ask for two separate bills.

Meals

The County is following the rates posted by the Federal GSA agency indicated in the rate table listed at <http://www.gsa.gov> Please be sure to check the website for the latest per diem rate applicable to your travel destination. There is no need to supply meal receipts for your claim. The following are examples of the process for meal reimbursements:

Example 1: Travel Destination Las Vegas, Nevada

1. Go to <http://www.gsa.gov/>, under home page, click "**Per Diem Rates**"
2. Type in Las Vegas, Nevada and click on "**Find Per Diem Rates**"
3. For Las Vegas, Nevada click on the "**Meals & Inc. Exp. ****" (\$71) column.
4. The meal breakdown (under the \$71 column) is \$12 Breakfast, \$18 for Lunch, & \$36 for Dinner + \$5 incidentals = Total of \$66 per day

Example 2: Sacramento, California \$10 for Breakfast, \$15 for Lunch, & \$21 for Dinner = Total of \$46 per day

Example 3: San Francisco, California \$12 for Breakfast, \$18 for Lunch, & \$36 for Dinner = Total of \$66 per day

If your class or airlines flight includes a full meal, do not include it in your food cost. (A continental breakfast is not a full meal) *Please note alcoholic beverages and tips are not reimbursable.*

Travel

Costs will be applied to the fund based on the least expensive mode of travel.

- **Airfare:** Proof of cost and proof of payment are required. Documentation must show dates/times and cost of travel. This can be a complete copy of the receipt, tickets(s), or a complete (detailed) itinerary showing all dates/times and costs with a paid balance.
- **Mileage:** Mileage reimbursement is calculated at the current rate. Only mileage to/from the work site/event location is eligible. Parking is included with receipts. Mileage for County cars is not included. If the mode of travel is other than automobile, and the employee claims mileage for transportation to/from the airport (or common carrier); the fund will pay for mileage to/from the work site and parking (car storage), **OR** taxi/shuttle fee for the same route, whichever is less.
- **Shuttle / Taxi / Parking:** Transportation (usually to/from the airport) & parking will be paid based on receipts. If there are no receipts, an expenditure of \$10.00 or less will be allowed. (Many hotels offer free shuttles to/from the airport. If a free shuttle is indicated in the brochure, a fee cannot be applied to the fund.)
- **Rental Cars:** The daily flat rate for the automobile is eligible for reimbursement. The fund will not cover insurance, fuel, mileage fees, or other ancillary fees.
- **Train/Bus:** The standard requirements (proof of dates of travel, cost & payment) apply.
- **If traveling out of the 48 contiguous states submission to RNPA must be Twenty (20) working days prior to travel date so it can be processed by ED and the County Executive's Office.**

PLEASE NOTE:

- Items not applicable for reimbursement include charges for: telephone use, movie rentals, honor bar purchases, tips, valet services, insurance, fuel or oil.
- These guidelines are written in accordance with the County Travel Policy. Where there is a conflict or omission, the County Travel Policy will take precedence. Some of the information in the County Travel Policy does not pertain to travel using the Professional Development Fund. For instance: using a Pcard for travel is not permissible. There are no cash advances allowed via the Professional Development fund. It is not expected that employees will use the County's travel agency for this type of travel reimbursement.
- Finally the County expects the employees to use reasonable and prudent use of public funds. If you have questions, please contact RNPA Office at 292-6061.



950 South Bascom Ave Suite 2120
San Jose, CA 95128
P (408) 292-6061 | F (408) 292-4729
www.rnpa.net

RNPA Professional Development Fund Application

Name: Last First County Employee ID#:
Mailing Address: Zip Code:

Work Number: Home Number:

Email Address:

Position Title: Work Unit: RN License:

Course/Event Title:

Describe how this course/event relates to your job:

Please attach a copy of the pamphlet, flier, etc. that contains relevant information about the course. This should include date(s), location, and cost(s).

Location of Course/Event: Street City County

Date(s) of Course/Event:

Table with 4 columns: Estimated Costs, RN Use, RNPA Approved, County Approved. Rows include Registration Fee, Required Book(s)/Materials, Meals, Travel, Lodging, Other, and Total.

Mode of Travel: Car (private) Car (County) Air Train Bus other

- Submit paperwork to RNPA twenty (20) working days prior to travel date so it can be processed by ED and the County Executive's Office. Per the County Travel Policy: "For travel out of the 48 contiguous states or internationally, a travel authorization form must be completed and approved by the County Executive prior to the trip, or for certain travelers, by the Board of Supervisors in public session or by the Chair of the Board."

Is this Course/Class: Graduate Level Undergraduate Level CEU Other Certification
[Graduate courses are subject to Federal withholdings pursuant to IRC Src. 127]

I hereby certify that no amount claimed has been reimbursed by any other source and my claim, the items, amounts statements as herein set are true correct in accordance with Education Assistance Program standards.

Employee Signature Date 5/2012



950 South Bascom Ave Suite 2120
San Jose, CA 95128
P (408) 292-6061 | F (408) 292-4729
www.rnpa.net

RNPA Representative Use Only

PDF Representative _____ Approved _____ Denied _____
Application Submitted _____
Comments: _____

Approval Letter Sent: _____
Receipts Sent: _____
Check Arrival Date/Amount _____
Comments: _____

County Representative Use Only

ED Representative _____ Approved _____ Denied _____
Date _____
Comments: _____

Committee Use Only

Actual Costs:

- 1. Registration Fee _____
- 2. Book(s) _____
- 3. Meals _____
- 4. Travel (Specify) _____
- 5. Lodging (Single Rate) _____
- 6. Other (Specify) _____
- 7. Total _____

Notes: