

## TESL – Training Education and Study Leave

### *Implementation Guide to NSW Health PD2019\_043 Training, Education and Study Leave (TESL) for Staff Specialists*

**Policy Number** 3.165

**Policy Function** Human Resources

**Issue Date** 25 June 2019 (*Minor update to incorporate PD2019\_043; change to Government Sector Employment Act 2013 No 40 and IB2019\_040 on 30 August 2020*)

**Summary** This implementation guide provides Justice Health and Forensic Mental Health Network (the Network) staff procedures to follow when claiming or managing applications for Staff Specialists for Training Education and Study Leave.

**Responsible Officer** Executive Medical Director

**Applicable Sites**

- Administration Centres
- Community Sites (e.g. Court Liaison Service, Community Integration Team, etc.)
- Health Centres (Adult Correctional Centres or Police Cells)
- Health Centres (Youth Justice Centres)
- Long Bay Hospital
- Forensic Hospital

**Previous Issue(s)** Policy 3.165 (6 April 2016)

**Change Summary**

- Amendment to implementation guide;
- Changes reflect inclusion of NSW Health PD2019\_043 *Training, Education and Study Leave (TESL) for Staff Specialists*;
- Inclusion of iExpenses process for TESL claims;
- Inclusion of HealthRoster and presenting at external events as part of TESL; and
- Update of legislation, references and related documents.

**TRIM Reference** POLJH/3165

**Authorised by** Chief Executive, Justice Health and Forensic Mental Health Network

## 1. Preface

This implementation guide provides Justice Health and Forensic Mental Health Network (the Network) staff with procedures pertaining to and governing Training, Education and Study Leave (TESL) for Staff Specialists. This should be read in conjunction with the NSW Health Policy Directive [PD2019\\_043](#) *Training, Education and Study Leave (TESL) for Staff Specialists*.

## 2. Policy Content

The Network has a responsibility to ensure all Staff Specialists employed have appropriate and equitable access to TESL that is relevant to both the Staff Specialist and the employer – the public health organisation (PHO) in accordance with the employment conditions for Staff Specialists.

NSW Health has a comprehensive [PD2019\\_043](#) *Training, Education and Study Leave (TESL) for Staff Specialists* that outlines the entitlements and obligations of Staff Specialists to TESL. Staff Specialists should refer to this policy with respect to claiming TESL entitlements.

The expenses covered by TESL funds are:

- Conference registration or course fees
- Accommodation allowances
- Per diem payments
- One third of the costs of membership(s) in specialist colleges
- Books and journals relevant to the Staff Specialist's area of speciality which will remain the property of the PHO, and
- Post-graduate course fees for courses that are relevant to the staff specialist's area of speciality.
- Laptops and mobile internet capable devices required for work purposes (where these have not otherwise been provided by the employer)

This implementation guide details the procedures for organising and claiming TESL entitlements consistent with NSW Health policy.

### 2.1 Mandatory Requirements

Staff Specialists should refer to this implementation guide and the NSW Health [PD2019\\_043](#) *Training, Education and Study Leave (TESL) for Staff Specialists* with respect to their TESL entitlements.

## 3. Procedure Content

### 3.1 TESL Application Procedure for Attending Conferences or Other Educational Activities.

TESL applications for conferences and/or other educational activities should be submitted at least eight weeks prior to the intended commencement of the event.

Should a Staff Specialist wish to attend a conference or other educational activity and apply for leave under TESL, the following procedure should be followed (see also [Appendix 1](#) for TESL application flowchart):

1. The Staff Specialist prints a copy of the Network *Application for TESL Fund* form ([EMP163](#)) and completes Sections 1a-d of the form (if all are applicable). A formal travel itinerary must be attached to the application as well as other supporting paperwork. The TESL application is forwarded to the relevant Clinical Director (CD) and the Directorate Personal Assistant or Administration Officer (PA).

The Directorate PA reviews the application, confirms that all relevant documentation is attached and requests a copy of the Staff Specialist's TESL balance from the relevant Business Manager. These documents once collated, must be forwarded to the following managers for approval:

- a) Clinical Director;
  - b) Co-Director Services and Programs (Clinical) or Co-Director Forensic Mental Health (Clinical);
  - c) Executive Medical Director (EMD) for final approval.
  - d) The Director Medical Programs will first review the staff specialist's TESL application(s) for TESL guideline compliance prior to EMD sign-off
2. Once approved by the EMD, the PA to the EMD places a copy of the Staff Specialist's TESL application in HPRM and TESL tracker spreadsheet. The PA to the EMD then forwards the approved paperwork to the Directorate PA for further management.
  3. If not approved by the EMD, the Staff Specialist's CD is notified by the EMD of the reason(s) for non-approval and any modifications required. The CD then notifies the Staff Specialist.
  4. The Directorate PA will provide assistance to the Staff Specialist in the following areas as required:
    - a) Airline booking arrangements via the government contractor. Payment is arranged by the Network Finance Department directly to the government contractor. From time to time, a Staff Specialist may elect to pay the government contractor directly for the approved itinerary and seek reimbursement for the cost incurred after the TESL event is completed.
    - b) Conference fees, transport and accommodation booking arrangements.
    - c) Completion of section 3 of the Network [EMP163](#) *Application for TESL Fund* form
  5. The CD's PA ensures all paperwork is captured in HPRM and forwards the HPRM link to the relevant Business Manager.
  6. The relevant Business Manager checks
    - a) Funding is approved;
    - b) A cost centre code is allocated;
    - c) GST application/calculation on TESL expense is correct e.g., international costs not entered as GST applicable;

- d) Correct General Ledger code has been listed;
  - e) Reimbursement of any TESL related expenses claimed in advance by the Staff Specialist which should be limited to registration fee only.
7. On completion of TESL, the Staff Specialist completes an electronic expense claims form via [iExpenses](#) attaching tax invoices or receipts and credit card (or bank statement) confirming the expenses, to claim all entitled costs and reimbursement. To reduce errors in iExpenses submission and/ or delays in reimbursement, it is recommended that the Directorate PA provide the Staff Specialists with assistance in this matter; and have the claim checked in advance by designated Business Manager(s) and/ or Medical Administration prior to commencing iExpenses submission.
8. The expenses that can be claimed may include:
- a) Self-funded accommodation
  - b) Self-funded conference fees
  - c) Other expenses being either:
    - i. *Per diem* claim to cover ‘incidentals’. The per diem rate can be calculated from [TD2019/11 Taxation Determination: Income tax: what are the reasonable travel and overtime meal allowance expense amounts for the 2019-20 income year?](#) AND ‘Official incidentals’ not covered by the per diem allowance (see definition below); Australian Taxation Office – Tax Determinations are released each financial year for Reasonable Travel and Meals Allowance  
OR
    - ii. Claim for actual expenses.
9. The electronic [iExpenses](#) claims form will be workflowed to the Staff Specialist’s line manager(s) for approval and appropriate delegated authority in accordance with our Delegations Authority. Finance will review all claim for accuracy and completeness before payment. All incomplete claims will be returned to claimants to rectify and re-submission.
10. The relevant Business Manager arranges:
- a) Reimbursement to the Staff Specialist; and
  - b) Enters financial data on the Staff Specialist’s TESL Spreadsheet. [The CD’s PA is responsible for entering the Staff Specialist’s TESL days into their regular timesheet(s) and ensuring that all original paperwork is captured in HPRM].
11. The Staff Specialist submits appropriate feedback regarding the conference or educational activity within four weeks of return to the Directorate of Medical Administration (DMA) for review (as per Section 3.3).

## 3.2 Presenting at External Events as Part of TESL

Staff Specialists presenting at external events as part of TESL are required to provide a copy of either an Abstract of the presentation or Summary of the presentation to the EMD with their Application for TESL Fund form for approval of the TESL event and endorsement of the presentation. Policy [2.013 Conference Attendance](#) only applies to non-TESL attendance at a conference by a staff specialist.

### 3.3 Flight Bookings

Staff Specialists should obtain flight options and quotes directly from the approved government contractor. The government contractor must be used to book flights in accordance with NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#) unless exempted under the terms of that policy. Flight booked must be the most direct route. Once the TESL application is approved, the Network will arrange payment to the government contractor. From time to time, a Staff Specialist may elect to pay the government contractor directly for the approved itinerary and seek reimbursement for the cost incurred after the TESL event is completed.

For all other policy matters relating to travel and bookings, such as Funding Entitlements, Registration and Course Fees, Per Diem Allowances, Incidentals, Amendments to Travel Itinerary, Frequent Flyer Points, Travel Insurance Coverage, Meals, Accommodation, and for any other travel arrangements, refer to NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#).

### 3.4 Feedback Report

As per NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#), Staff Specialists must provide a report within four weeks of returning from TESL, to the DMA dealing with the outcome / benefits of the leave. This may be done by:

- Completing the Network *TESL Feedback Report* form ([EMP170](#)) which is then sent to the DMA for the EMD's review and approval, and uploading onto the intranet.

### 3.5 Other Expenses Covered by TESL Funding

The NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#) includes entitlement to other expenses such as:

- One third of the costs of membership(s) in specialist colleges
- Books and journals relevant to the Staff Specialist's area of speciality which will remain the property of the PHO, and
- Post-graduate course fees for courses that are relevant to the staff specialist's area of speciality.
- Laptops and mobile internet capable devices required for work purposes (where these have not otherwise been provided by the employer)

The NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#) should be referred to for full details of these funding entitlements.

Application for approval for any of the above non-standard TESL entitlements (not being conference or other educational event attendance or site visits) can also be made via the Network *Application for TESL Leave* form ([EMP163](#)). Sections 1b-d will need to be completed if relevant. The completed TESL application form is sent to relevant managers for approval as per Section 3.1. Reimbursement of these expenses should also be made via iExpenses as detailed in this section.

### 3.6 HealthRoster / Payroll Processing Procedures

For payroll processing purposes, when a Staff Specialist takes TESL leave it must be entered in HealthRoster. When a Staff Specialist's TESL leave falls on their usual paid working days their regular shift is updated as follows by right clicking on their regular shift tile:

Non Productive→Study Leave→TESL-TES Leave,

When a Staff Specialist's TESL leave falls on a non-working day HealthRoster is updated by right clicking on the DO (Day Off) tile and adding a "Payflag" for TESL Not Worked.

Entering TESL leave on a day not normally worked does not create a payment in HealthRoster but debits the day from the Staff Specialist's TESL leave balance.

For further information regarding TESL days debited on non-working (non-paid) days, refer to NSW Health [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#) section 4.2.2 *Debiting of TESL Days*,

## 4. Definitions

**Incidentals** – Allowance entitlement *to contribute to* miscellaneous personal expenses such as telephone, laundry, internet access, gratuities, taxis for personal reasons. These expenses are covered in the daily per diem allowance (see below).

**iExpenses** – An electronic system that allows employees and contractors with a StaffLink number to enter work-related expense claims for reimbursements ('Expense Reports') via a computer or mobile device. Users can also add and update their bank account details and remittance email address.

**Official Incidentals** – 'Official incidental' expenses are not covered by the daily per diem allowance rates and are entitled to be reimbursed in addition to the 'incidentals' included in the per diem rate. 'Official incidentals' include taxi, train or bus fares to and from airports and stationery items. An estimated cost of such items should be included on the application, with reimbursement subject to the presentation of receipts.

#### Per Diem allowance:

- a) Overseas Per Diem: allowance paid to Staff Specialist to cover the cost of meals and 'incidentals' (see above), but **not** including accommodation. The amount paid per day is in accordance with the rates published by the ATO as reasonable travelling allowances.
- b) Domestic Per Diem: allowance paid to Staff Specialist to cover cost of meals and 'incidentals' (see above), including accommodation. The amount paid per day is in accordance with the rates published by the ATO as reasonable travelling allowances.

#### TESL – Training, Education and Study Leave;

- TESL is paid leave (for normal rostered duties) and provides for the payment of expenses (as defined in the determination) for the purposes of training, education and study for Staff Specialists.
  - Paid leave days are those normally worked and not for weekend days or days not normally worked - see examples in [PD2019\\_043 Training, Education and Study Leave \(TESL\) for Staff Specialists](#) to assist with each claim.

- Part time Staff Specialists whilst on TESL will only be paid for those days they would usually work, but are entitled to other TESL payments while on TESL for days when they would not usually work.
- Where a Staff Specialist is on TESL on a day not normally worked, the following process will apply:
  - A TESL day will be debited from the Staff Specialist's TESL leave balance
  - Travel, accommodation, per diem allowances will be paid at the full time rate.

**TMF** – Treasury Managed Fund.

## 5. Legislation and Related Documents

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|-----------------------------|---|
| Legislations                | <a href="#"><u>Government Sector Employment Act 2013 No 40</u></a>  |
| NSW Health Policy Documents | <p><a href="#"><u>IB2019_040</u></a> <i>Staff Specialists' Training Education and Study Leave (TESL) - New Funding Entitlement 2019/2020 (Updated annually)</i></p> <p><a href="#"><u>PD2005_415</u></a> <i>Sponsorship Policy – NSW Health</i></p> <p><a href="#"><u>PD2015_009</u></a> <i>Staff Specialists Rights of Private Practice Disbursement of Funds No 2 Accounts</i></p> <p><a href="#"><u>PD2019_043</u></a> <i>Training, Education and Study Leave (TESL) for Staff Specialists</i></p> <p><a href="#"><u>PD2016_010</u></a> <i>Official Travel</i></p> |
| Network Policies and Forms  | <p><a href="#"><u>2.014</u></a> <i>Corporate Records Management</i></p> <p><a href="#"><u>2.022</u></a> <i>Delegations Authority</i></p> <p><a href="#"><u>2.013</u></a> <i>Conference Attendance</i></p> <p><a href="#"><u>EMP 163</u></a> <i>Application for TESL Fund Staff Specialist (State) Award Entitlement</i></p>   |
| Australian Taxation Office  | <a href="#"><u>TD2019/11</u></a> <i>Taxation Determination: Income tax: what are the reasonable travel and overtime meal allowance expense amounts for the 2019-20 income year? (Updated Annually)</i>  |
| Industrial Instruments      | <p><a href="#"><u>Staff Specialists (State) Award (2019)</u></a></p> <p><a href="#"><u>Staff Specialist Determination 2015</u></a></p>  |

## Appendix 1: TESL Flowchart

