

Clause 10 Employment Related Expenses

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Clause 10.0 Employment Related Expenses

The parties acknowledge the importance of timely reimbursement of expense claims under this clause. The Employer commits to process all completed reimbursement claims within 4 to 6 weeks of their submission. Where there is a pattern of failure to meet these timeframes, STONZ will raise the issue with District management, and the parties will work to address any systemic problems.

- 10.1 The cost of an annual practicing certificate (including disciplinary levies where these are a prerequisite) shall be refunded to the RMO by their employing District provided that:
- 10.1.1 It must be a statutory requirement that a current certificate be held for the performance of duties.
 - 10.1.2 The employee must be engaged in duties for which the holding of a certificate is a requirement.
- 10.2 The parties acknowledge that the Medical Council of New Zealand has introduced a requirement that RMOs who are registered in only a general scope of practice, and who are not participating in a vocational training programme, must participate in the approved recertification programme provided by BPAC (NZ) (In Practice). The parties agree that the costs of registration in this programme are an employment related expense within the meaning of the relevant clauses of the CA, and will be met directly, or be reimbursed, by the employing District.
- 10.3 The employer will reimburse the costs of membership of postgraduate colleges and other associated bodies required as part of a vocational training programme.
- 10.4 In recognition of the parties' mutual support for Māori medical practitioners, the employer will reimburse full membership of Te Ohu Rata o Aotearoa – Māori Medical Practitioners Association (TeORA) to eligible employees to a maximum of \$300 per annum. The parties agree to review the level of fee reimbursement if these are proposed to increase.
- 10.5 The employing District will reimburse the cost of initial application for provisional general registration to employees who graduate from a NZ medical school.
- 10.6 For Registrars on a vocational training programme:
- 10.6.1 The employing District shall reimburse the actual and reasonable costs of the training undertaken to obtain a New Zealand or Australasian vocational scope of practice, on the production of receipts, provided the employee is employed in New Zealand when the training is undertaken. For the sake of clarification, the above proviso is not intended to affect the practice whereby employees are reimbursed promptly upon production of receipts.
 - 10.6.2 The parties agree that the employing District may, where the employee requests it, directly pay to training providers training costs for RMOs. The RMO agrees that any full or partial refund of a training cost reimbursed or paid under this clause shall be paid back to the Employer that made that reimbursement or payment. Costs for the purposes of this clause shall include course, examination, modules and clinical assessments and other fees where they are incurred as a direct result of training required for achieving vocational scopes of practice.
 - 10.6.3 Registrars will be reimbursed for required texts, travel, and accommodation related expenses (including meals). Vocational scopes of practice training includes, but is not limited to, such training as diplomas in child health, diplomas of O & G, ACLS, APLS, EMST, BST, other advanced diplomas and degrees.
 - 10.6.4 Agreement for reimbursement for any training costs not expressly covered by this agreement shall be discussed between the parties. The parties agree to work collaboratively towards the most cost-effective mechanism of funding these costs without minimising any employee's individual contractual rights under the CA.
- 10.7 Notwithstanding the above, approval from the appropriate clinical lead must be obtained in respect of any costs associated with sitting a vocational examination for the second time, or in the instance of an examination required to obtain vocational registration (such as a fellowship exam or similar) the employer

will reimburse up to three attempts. Notwithstanding the foregoing, where there are extenuating circumstances, and this is supported by the relevant College, the Service may, at its discretion, support further examination attempts.

- 10.8 Registrars not in a vocational training programme and House Officers in their second year and above will be entitled to the costs pertaining to attending approved courses and events that facilitate their acceptance onto a vocational training programme, subject to support from the appropriate clinical lead. Costs for this purpose include reimbursement for required texts, travel, and accommodation related expenses (including meals), and includes, but is not limited to, such training as ASSET, CCrISP, EMST, Clear, ACLS, APLS, college exams, and application to training fees. Agreement for reimbursement for any costs not expressly covered by this agreement shall be discussed between the parties if deemed relevant for progression towards a vocational training pathway.
- 10.8.1 If there is dispute regarding the relevance of a particular cost for the purposes of progression towards a vocational training pathway, this dispute shall be referred to the Chief Medical Officer (or their delegate) for resolution and in consultation with department clinical lead.
- 10.8.2 All Registrars, whether or not on a vocational training programme, will be entitled to an additional maximum of \$2,000 per annum for each full year of service with effect from 10 December 2018 for the purpose of implements to aid in training. This entitlement shall move to a 1 February - 31 January year basis from 2025 (see clause 10.8.4). Costs for this purpose include but are not limited to personal computers / tablets, textbooks not on the required reading list, subscriptions to journals, subscriptions to vocational education websites and personal surgical / medical equipment. This allowance can also be used for conferences. Eligibility is subject to the RMO completing 12 months of service as an RMO with Te Whatu Ora. The approval and administration of this entitlement will be subject to the Employer's policies around CME funding.
- 10.8.3 The funding in 10.8 may be accrued for up to the equivalent of three years' entitlement (\$6,000) and may be transferred between District employments, provided the quantum does not exceed this amount.
- 10.8.4 As part of aligning the entitlement in 10.8.2 to the new RMO rotation dates, and as a one off, an allocation of \$300 for the period from 10 December 2024 to the 31 January 2025, and the maximum accrual will be extended to \$6,300 between 31 January 2025 and 31 January 2027.
- 10.9 In addition to 10.8, from 18 January 2021, House Officers (including Senior House Officers) in their second and subsequent year of service with the Employer can access a grant on the following basis:
- 10.9.1 Reimbursement to an additional maximum of \$500 per annum to support purchase of textbooks, subscriptions to journals, subscriptions to vocational education websites or attendance at conferences. The purpose of this grant is to assist them in their acceptance onto a New Zealand or Australasian vocational training programme.
- 10.9.2 Proposed expenditure for which reimbursement under this clause is sought should be discussed with the relevant educational supervisor or senior medical officer with an understanding of the entry requirements of the particular vocational programme and should be part of a House Officer's documented career plan.
- 10.9.3 The grant is portable between Districts and may only be claimed in two successive years (i.e., a maximum of \$1,000 per House Officer over two years). Any unspent amount does not carry over when the RMO is appointed to a Registrar position, where the specific provision of 10.8.2 apply.
- 10.9.4 The grant under this clause cannot be used to reimburse the purchase of IT equipment or medical/surgical equipment.
- 10.10 The employer shall reimburse an employee for membership of the Medical Protection Society or an agreed alternative.
- 10.11 Where employees are required to use their own cars for the purposes of work (such as on-call components, or travel to satellite sites away from the primary workplace), the employer shall pay a private motor vehicle mileage allowance at the standard IRD rate, subject to prior approval and

conditions established by the employer. Any change to this rate shall be effective from the first pay period following the date of promulgation by the IRD.

- 10.12 Where the mileage allowance is paid, an employee may also claim actual and reasonable costs of that work-related travel in accordance with Employer policy. Such costs may include parking charges (excluding parking fines) and road tolls.

Employment Related Expenses Overview – Application

Overview

The parties acknowledge the importance of timely reimbursement of expense claims under this clause. The Employer commits to process all completed reimbursement claims within 4 to 6 weeks of their submission. Where there is a pattern of failure to meet these timeframes, STONZ will raise the issue with District management, and the parties will work to address any systemic problems

Permanently employed RMOs are entitled to the following employment related expenses;

- Practising Certificate including initial MCNZ application
- Advanced Cardiac Life Support Certificate (ACLS)
- Indemnity Insurance (Medical Protection Society or an agreed alternative)
- Inpractice or Australasian Training College Fees (whichever is relevant)
- Membership of Te Ohu Rata o Aotearoa – Maori Medical Practitioners Association (TeORA) to eligible employees to a maximum of \$300 per annum. The parties agree to review the level of fee reimbursement if these are proposed to increase.

Please refer to the [Continuing Medical Education \(CME\) section](#) for provisions outlined in clause 10.8.2.

It is always advised when seeking reimbursement for expenses that you discuss any questions there may be around eligibility or what is a reasonable cost for travel expenses with the District prior to purchase, to avoid any disappointment should the expense not be reimbursable.

When booking travel and accommodation in order to be reimbursed, the costs must be reasonable. When taking into consideration whether a cost is reasonable or not, one test is to ask is whether you would be comfortable with the cost if you were paying for it yourself.

'Actual and reasonable' will be no less than the amounts provided for under the Meals and Incidentals provisions at clause 34.1 of the Collective Agreement. Generally, claims for alcohol will not be reimbursed.

Interpretational note:

Generally, the \$65 per day should apply. Consideration should be given to actual costs incurred, where this is commensurate to the reimbursement. Example: Where an employee was away for less than 10 hours but had to incur breakfast and lunch expenses because catering was not provided, or an early flight/travel was required, actual expenses would be commensurate and justifying of the \$65 amount.

Eligibility

The following sets out how eligibility for training related expenses are determined for RMOs throughout the various stages of their training.

RMOs on a vocational training programme

- The relevant specialty college determines the requirements of training for the vocational scope of practice
- The RMO is entitled to actual and reasonable costs associated with these requirements
- RMOs may attend courses that although not a requirement of training are considered to be of considerable benefit towards their training. These courses are determined by the Specialty College and detailed in Appendix 1.

RMOs (PGY2+) not on a vocational training programme

- Facilitation onto a training programme is determined by the application prerequisites set by the relevant Specialty College
- RMOs are entitled to actual and reasonable costs that facilitate acceptance onto a training programme. This may include courses or question banks that assist with preparation for exams which are a prerequisite for acceptance onto the training programme.

Reimbursement of Training Expenses

Prerequisites for entry onto training programmes are included in [Appendix 1](#). Where there is an expense not detailed on the lists in Appendix 1, the escalation process detailed in clause 10.8.1 will apply.

Registrars undertaking a vocational training programme to obtain a New Zealand or Australasian vocational scope of practice, shall be reimbursed actual and reasonable costs associated with training on the production of receipts; provided the Registrar is employed in New Zealand when the training is undertaken.

Costs shall include course, examination, modules and clinical assessments and other fees where they are incurred as a direct result of training required for achieving vocational scopes of practice.

For any training costs that are expressly covered by this agreement shall be discussed between the employing District and STONZ.

Reimbursement Lists

The lists detailed in [Appendix 1](#) have been developed to provide a guide on appropriate and relevant expenses that facilitate acceptance on to a training programme, or are requirements for completion of vocational training.

At a minimum, reimbursement lists will be reviewed for relevance after each CA settlement as part of the scheduled manual review. Ad-hoc requests to add or remove items from the reimbursement lists are to be completed on the [‘Reimbursement List Request for Addition or Removal of Item’ form](#).

The form sets out criteria to be met in order for the request to be submitted to the STONZ National Engagement Forum (SNEF) for endorsement. This is based on the item’s relevance to training and acceptance on to training.

Completed requests for ad-hoc changes are to be submitted via the process detailed on the form. The STONZ Engagement Forum (SNEF) will be responsible for considering and endorsing completed requests for ad-hoc changes to the reimbursement lists, incomplete requests will not be considered. The SNEF meet four times per calendar year which provides a quarterly process for requests to be considered.

Travel Related Expenses

RMOs are entitled to reimbursement of employment related expenses and training related expenses. The following table provides a guideline when booking travel and accommodation (including meals).

Where there is a course available in both Australia and New Zealand with the same content, rationale must be provided if registering to attend the Australian Course.

Accommodation Guidelines (except where District policy differs)	
Cost per night	<p>\$200 within NZ \$250 in Australia</p> <p>It is acknowledged that there may be instances where standard accommodation costs are outside these guidelines, particularly where special events may be occurring.</p> <p>Accommodation costs outside this guideline should be discussed with the District prior to booking. The District will endeavour to ensure any escalation for approval is managed in a timely manner.</p>
How many nights	<p>The night prior to the course/conference/exam commencing and the night of the course/conference/exam</p> <p>Note: Some regional Districts may require additional accommodation due to flight availability; this should</p>

	<p>be discussed on a case by case basis with the District.</p> <p>Requests for additional nights of accommodation, including the reason for this, are to be discussed with the District.</p>
Transport Guidelines (except where District policy differs)	
Flights	Economy class flights. The most economical option on the day of booking must be selected this may not necessarily be Air New Zealand.
Taxis	<p>The most economical</p> <ul style="list-style-type: none"> • Airport parking • Taxis/shuttle between airport – home • Taxis airport – hotel • Taxis hotel – course / conference / exam • Ride Share • Taxi Chits
Rental Cars	Where a rental car may be a more economical option this is to be discussed with the RMO Support Unit.
Personal Cars	Where a private car may be a more economical option petrol costs will be reimbursed on proof of purchase.
Parking charges and road tolls	Where the mileage allowance is paid, you may also claim actual and reasonable costs of that work-related travel in accordance with District policy. Such costs may include parking charges (excluding parking fines) and road tolls.
Meals Guidelines (except where District policy is not less than)	
<p>Meals</p> <p>Note: meals are reimbursable as part of travel and accommodation under clauses 10.6.3 and 10.8</p>	<p>‘Actual and reasonable’ will be no less than the amounts provided for under the Meals and Incidentals provisions at clause 34.1 of the Collective Agreement. Generally, claims for alcohol will not be reimbursed.</p> <p>Generally, the \$65 per day should apply. Consideration should be given to actual costs incurred, where this is commensurate to the reimbursement. Example: Where an employee was away for less than 10 hours, but had to incur breakfast and lunch expenses because catering was not provided, or an early flight/travel was required, actual expenses would be commensurate and justifying of the \$65 amount.</p>
Conference Dinner	<p>Dependent on District policy</p> <p>Consideration to reimburse if presenting</p>

Employment Related Expenses Frequently Asked Questions (FAQs)

1. What are the expected timelines for payment of training costs when I submit a reimbursement claim?
 - There is a general expectation that reimbursement of training costs will occur within 4-6 weeks of a complete claim being submitted to the District i.e. the claim has all of the necessary supporting documentation that meets finance audit guidelines to allow processing.
 - At times where Districts are experiencing peak volumes for processing reimbursements and there is a concern this may impact the 4-6 week timeframe this should be communicated to STONZ as early as possible.
 - Where there is a pattern of failure to meet these timeframes, STONZ can raise the issue with District management and the parties will work to address any systemic problems.
2. Are RMOs able to share accommodation?
 - Yes, RMOs are able to share accommodation and costs. This can be reimbursed to either one RMO or all RMOs sharing the costs.
3. If I do not have a permanent position and work as a locum am I entitled to reimbursement of employment related expenses?
 - No, locums are not entitled to reimbursement of any employment related expenses detailed in clause 10.0.
4. If I work part time am I eligible for reimbursement of employment related expenses?
 - Yes, RMOs working on a part-time basis are entitled to full reimbursement of employment related expenses, they are NOT prorated to their FTE.
5. If I am on LWOP or Parental Leave can I claim reimbursement for expenses?
 - Yes, you are still employed and therefore entitled to reimbursement.
6. If I book a flight and use reward dollars/points to pay for it can I claim reimbursement?
 - No, reimbursement will not be made for payments made with reward dollars/points.
7. I have had medical education leave (MEL) approved, does this mean automatic reimbursement of associated costs?
 - No, MEL approval does not mean automatic reimbursement of costs. You will still need to meet the eligibility requirements for the training related expense.
8. Are fellowship application fees reimbursable?
 - Yes, the entry fee is for Australasian Colleges; however ongoing fellowship membership fees are not.
9. I am employed as a Fellow under the CA and have not completed training, am I eligible for employment related expenses under clause 10?
 - Yes you are entitled to expenses under this clause and you are considered to be a Registrar on a vocational training programme working towards vocational scope of practice.
10. If I am required to sit a vocational exam more than once, is this reimbursed?
 - If you are required to sit an exam again, you will need to have approval from the appropriate clinical lead (who this is may vary between Districts). Once approval to re-sit is given you will be reimbursed. Reimbursement will be made for up to three attempts, with the approval of the appropriate clinical lead.
 - Where there are extenuating circumstances, and this is supported by the relevant College, the service may, at its discretion, support further examination attempts.
11. I have received a request for a training related reimbursement from an RMO who is a SET trainee for a course that is being held in Australia in March of the following year. The RMO is resigning their District employment in December when they will take up a SET position in Australia, are they entitled to reimbursement?
 - No, an RMO must be employed in New Zealand when the training occurs. Although the RMO has incurred the cost prior to leaving their District employment there is no entitlement to

reimbursement because they will not be employed in New Zealand at the date they attend the course.

12. I want to attend a conference can I get this reimbursed?
- You can claim for conferences under Clause 10.6 and 10.8 in the following situations;
 - The conference is a requirement of your training as detailed in the reimbursement list set out at Appendix 1.
 - You are presenting at a conference and have approval from the appropriate clinical lead (who this is may vary between Districts).
 - For conferences that do not meet the above criteria please refer to the following clauses;
 - Clause 8.0 Conference Leave
 - Clause 10.8.2 CME
13. A Registrar paid for their APC renewal on 1 December for the next 12 months but wasn't employed by Health NZ until 9 December – can they still get their APC reimbursed?
- Yes as it is a requirement of employment.
14. Which District do I submit my reimbursement claim to?
- You need to submit your claim for reimbursement of expenses to the District you are employed at when the cost is incurred. You must ensure that all claims are submitted to the District prior to leaving your employment.
 - Registrars are encouraged to avoid wherever possible purchasing items close to the end of the training year where they will be moving Districts. This is to avoid Districts having to process reimbursements once an RMO has already transferred to another District.
15. Do I require approval before using my own car for work purposes?
- Yes, prior approval may be required. Please refer to the relevant District policy and/or service orientation manual regarding use of private vehicles. Alternate options may also be provided including taxi cabs, fleet cars or shuttles.
16. Can I claim mileage from my home to my place of work?
- No, mileage claims relate to travel between the primary place of work and other satellite sites/community locations only.
 - The exception to this is when rostered on call (in line with clause 18 of the STONZ CA) an employee shall be reimbursed the actual and reasonable costs incurred in travelling to and from work when called back to work outside the employee's normal hours of duty.
17. Can I claim parking costs when parking at a satellite hospital and/or community location?
- This is dependant on District policy. Please check the District policy and/or discuss with the relevant RMO unit/service representative in advance.
18. I am required by the District to use my own car to travel between the hospital and community sites. What can I claim for in terms of mileage?
- Mileage between the primary place of work and relevant satellite sites including community locations can be claimed and will be paid in line with the standard IRD rate.
19. What happens if I spend 3 days a week in one location and 2 days a week at a second location which is further away from my home? Can I claim mileage to the location further away from my home?
- As a general rule (noting exception set out at FAQ 16), there is no entitlement to claim mileage for travel from your home to your primary place of work (and return). This includes where as part of your set work pattern your primary place of work involves a different location dependent on the day of the week. Please note individual District policy may vary.
20. Can I claim mileage if teaching is at a different location?
- If you are required to travel away from your primary place of work to attend teaching you are eligible to claim mileage. Prior approval for use of your own car may however be required to meet District policy.

Appendix 1 – Reimbursement Lists

The following table sets out the Reimbursement Lists for each College Specialty. The reimbursement lists are available on the Health NZ website where the National Manual is hosted under Clause 10 Employment Related Expenses. Click on the specialty to link to the reimbursement list.

Specialty	College
Anaesthesia	Australian and New Zealand College of Anaesthetists
Dental	Royal Australasian College for Dental Surgeons
Emergency Medicine	Australasian College for Emergency Medicine
Intensive Care Medicine	College of Intensive Care Medicine
Medicine	Royal Australasian College of Physicians
Obstetrics and Gynaecology	Royal Australian and New Zealand College of Obstetricians and Gynaecologists
Ophthalmology	Royal Australian and New Zealand College of Ophthalmologists
Paediatrics	Royal Australasian College of Physicians
Pathology	Royal College of Pathologists of Australasia
Psychiatry	Royal Australian and New Zealand College of Psychiatrists
Public Health	New Zealand College of Public Health Medicine
Radiation Oncology	Royal Australian and New Zealand College of Radiologists
Radiology	Royal Australian and New Zealand College of Radiologists
Rural Health Medicine	Rural Health Medicine Division of the Royal New Zealand College of General Practitioners
Surgery	Royal College of Surgeons
Urgent Care	Royal New Zealand College of Urgent Care

Clause 10.8.2 Continuing Medical Education (CME)

- 10.8.2 All Registrars, whether or not on a vocational training programme, will be entitled to an additional maximum of \$2,000 per annum for each full year of service with effect from 10 December 2018 for the purpose of implements to aid in training. This entitlement shall move to a 1 February - 31 January year basis from 2025 (see clause 10.8.4). Costs for this purpose include but are not limited to personal computers / tablets, textbooks not on the required reading list, subscriptions to journals, subscriptions to vocational education websites and personal surgical / medical equipment. This allowance can also be used for conferences. Eligibility is subject to the RMO completing 12 months of service as an RMO with Te Whatu Ora. The approval and administration of this entitlement will be subject to the Employer's policies around CME funding.
- 10.8.3 The funding in 10.8 may be accrued for up to the equivalent of three years' entitlement (\$6,000) and may be transferred between District employments, provided the quantum does not exceed this amount.
- 10.8.4 As part of aligning the entitlement in 10.8.2 to the new RMO rotation dates, and as a one off, an allocation of \$300 for the period from 10 December 2024 to the 31 January 2025, and the maximum accrual will be extended to \$6,300 between 31 January 2025 and 31 January 2027.

CME Overview – Application

District Policy for Continuing Medical Education (CME) Expenditure

This section sets out a number of guidelines to support national consistency around the administration of CME expenditure.

Principles

All registrars (full time and part time basis), whether on a vocational training programme or not, will be entitled to \$2,000 CME expenses per annum for each full year of service with effect from 10 December 2018.

Registrars are required to have completed 12 months continuous service in a District before receiving entitlement.

The CME entitlement may be accrued up to a maximum of \$6,000 and may be transferred between District employments, provided the maximum does not exceed this amount.

Districts should keep a record of payments made to RMOs against this entitlement, and include this in information on service-based employment entitlements as part of a certificate of service.

When a Registrar transfers between Districts their current CME balance will be transferred to the new District. Each District is responsible for ensuring all relevant information related to CME is provided to payroll for inclusion in the transfer information, exchanged between payroll departments, for employees transferring within Health NZ. Claims for CME expenses will not be processed or approved until this information has been received and confirmed.

Common Anniversary of 1 February

All registrars will have a common anniversary of 1 February each year. The annual CME entitlement will be pro rata in the first common anniversary year where:

- The registrar already has 12 months continuous service in a District at the date they become covered by the STONZ CA, where this is after the common anniversary of 1 February. The first full entitlement will fall due on the next common anniversary date the following year.

- The registrar completes 12 months continuous service and becomes eligible part way through the common anniversary year. The first full entitlement will fall due on the next common anniversary date the following year.

Change from 10 December to 1 February

As part of the 2024-2026 STONZ CA settlement the entitlement and common anniversary year moved from 10 December to 1 February annually. As part of aligning the entitlement, and as a one off, an allocation of \$300 for the period 10 December 2024 to 31 January 2025, and the maximum accrual will be extended to \$6,300 between 31 January 2025 and 31 January 2027.

Guidelines for Claims for Expenditure

Claims for expenditure will be recorded against the CME entitlement based on the date the cost is incurred. Claims older than 6 months will not be reimbursed.

CME claims cannot exceed the CME balance. Advances to CME entitlements are not permitted. Where the Registrar has a CME balance, but the total cost of the purchase exceeds the available CME balance, the amount reimbursed will be capped to the available CME balance for that year.

Where the amount reimbursed is capped, the GST and grossed up costs (where applicable) will be re-calculated based on the available CME balance. See the Frequently Asked Questions for examples of how this will be re-calculated.

If a Registrar wishes to purchase an item not specified in the STONZ CA, prior approval will need to be obtained from the District.

Registrars can only purchase one item of each from the following list within a 2 year period. These IT related items must be purchased in New Zealand:

- Laptop
- Tablet or similar (i.e. iPad)
- Mobile phone
- Mobile devices

The Districts do not insure for items of technology purchased with CME funds.

Any purchases which are not covered by the STONZ CA or deemed unreasonable will not be refunded.

Guidelines for Tax Treatment for IT Related Purchases

IT related purchases will be taxed according to current income tax legislation. These items are deemed to be equivalent to a salary payment and are subject to PAYE.

IT purchases will be grossed up and reimbursement of costs paid by payroll. Tax treatment through payroll includes:

- PAYE (taxed at extra emolument rate and ACC Earners Levy)
- Kiwisaver (employee and employer contributions)
- Student Loans

Guidelines for Deductions from CME Balance

Any purchases made overseas will have the total cost deducted from the CME balance.

Any purchases which are made in New Zealand and not IT related, will not have GST deducted from the CME balance.

Any purchases which are IT related will have the following deducted from the CME balance:

- Net cost and GST portion
- PAYE – grossed up (total cost including GST noting highest tax rate at 1 April 2021 is 39%)

- Kiwisaver – employee (at applicable contribution rate) and employer (3%) contributions

Guidelines for Claimable CME Items

Appendix 2 sets out the list of items that can be claimed as CME and how tax will be treated for each of these items. It also includes the list of items that can-not be claimed as CME.

RMOs should always check the individual District policy for approved CME items as they may vary across Districts dependent on individual District policy. What is defined as “reasonable” will be determined by the Districts policy and there may be a limit to what is a reasonable cost of a purchase. For example an IT accessory such as earphones may be an approved CME item, but noise cancelling earphones costing \$500 may not be deemed a reasonable expense.

Where an item is not on the approved list the RMO must check with the District prior to purchasing any item to confirm that it is an approved CME expense.

Submitting a Claim

Applications must be submitted on the District claim form or through the online claim process where this applies (dependent on the individual District requirements).

The claim must include a GST tax invoice (or an overseas equivalent of a tax invoice) and proof of payment for all purchases including travel, accommodation and taxi's.

Registrars must provide additional documentation to support their claim where requested by the District.

CME Frequently Asked Questions (FAQs)

1. Who is entitled to claim CME under the STONZ CA?
 - All Registrars (full time and part time) whether or not on a vocational training programme who have completed 12 months continuous service as an RMO with one or more Districts within NZ.
2. If I am a House Officer, can I claim CME?
 - House Officers do not have an entitlement to CME under the STONZ CA.
3. How much is my entitlement and does it accrue?
 - You receive \$2,000 per year (for each full year of service) and can accrue up to a maximum of \$6,000.
4. What is the anniversary date for my entitlement?
 - All registrars will have a common anniversary of 1 February each year. The annual CME entitlement will be pro rata in the first common anniversary year where:
 - The registrar already has 12 months continuous service in a District at the date they become covered by the STONZ CA, where this is after the common anniversary of 1 February. The first full entitlement will fall due on the next common anniversary date the following year.
 - The registrar completes 12 months continuous service and becomes eligible part way through the common anniversary year. The first full entitlement will fall due on the next common anniversary date the following year.
5. What is the impact of moving of the Registrar CME entitlement common anniversary date from 10 December to 1 February?
 - The previous common anniversary year for clause 10.8.2 was 10 December which aligned with the start of the RMO Year training year when the first STONZ CA was settled.
 - As part of the 2024-2026 STONZ CA settlement the common anniversary year moved from 10 December to 1 February each year. As part of aligning the entitlement, and as a one off, an allocation of \$300 for the period 10 December 2024 to 31 January 2025, and the maximum accrual will be extended to \$6,300 between 31 January 2025 and 31 January 2027.

6. Where will I find the claim form and policy guidelines?
 - The RMO Unit at the District will be able to advise you where you can access the claim form and District policy.
 - Districts will either have an online process for submission of claims or a paper based process. See '[Forms, Templates and Other Resources](#)' which provides access to the CME claim form that is used at some Districts.
7. What can I claim?
 - See [Appendix 2](#) which provides a guideline of items that can be claimed and those that cannot be claimed as CME.
8. What do I do if I want to claim something that is not on the approved list?
 - Please contact the RMO Unit and they will assess whether your purchase meets the requirements as per the District RMO CME Policy.
9. Who do I send my claim to and how long will it take to get my reimbursement?
 - You need to check with the RMO Unit at each District regarding the process for submission of claims and their processing timeframes.
10. Who approves my claim for CME?
 - The approval process may differ across Districts. In the first instance you should check with the RMO Unit regarding the approval process for CME claims.
11. What amount will be deducted from my CME entitlement?
 - See [Appendix 2](#) which details what will be deducted from the CME balance dependent on the CME item.
 - Purchases made overseas will have the total cost deducted from the CME balance.
 - Purchases which are made in New Zealand and not IT related, will not have GST deducted from the CME balance.
 - Purchases which are IT related will have the following deducted from the CME balance:
 - Net cost and GST portion
 - PAYE – grossed up (total cost including GST at flat rate noting the highest tax rate at 1 April 2021 is 39%)
 - Kiwisaver – employee contribution (at applicable contribution rate) and employer contribution (at applicable contribution rate)
12. How is tax calculated on IT related purchases and what will I be reimbursed?
 - IT related purchases will be taxed according to current income tax legislation. These items are deemed to be equivalent to a salary payment and are subject to PAYE. IT purchases will be grossed up and reimbursement of costs paid by payroll. Tax treatment through payroll includes:
 - PAYE (taxed at extra emolument rate and ACC Earners Levy)
 - Kiwisaver (employee and employer contributions)
 - Student Loans
 - See example provided under scenario #1
13. Can I purchase items and have it reduce off a future entitlement?
 - No. You can only purchase items if you have funds available in your CME balance.
 - Where the Registrar has a CME balance, but the total cost of the purchase exceeds the available CME balance, the amount reimbursed will be capped to the available CME balance for that year.
 - Where the amount reimbursed is capped, the GST and grossed up amounts (IT related purchases) will be recalculated based on the capped reimbursement.
 - See examples provided under scenario #2
14. Can I use my CME for conferences and associated expenses?
 - Yes, provided the cost does not exceed your CME balance and the items purchased are covered under the claimable items.

15. What happens if I submit a claim for CME where the cost was incurred more than 6 months ago?
- As a guide claims older than 6 months will not be reimbursed, however you should check with the individual District in case their District policy differs to this guideline.
16. Which District do I submit my claim to?
- You should submit your claim for reimbursement of CME expenses to the District you are employed at when the cost is incurred. You must ensure that all CME claims are submitted to the District prior to resigning or transferring your employment.
Registrars are encouraged to avoid purchasing items under their CME entitlement close to the end of the training year where they will be resigning employment. This is to avoid any issues associated with secondary tax where the purchase is an IT related expense and attracts PAYE.
17. Who can I contact if I have questions about CME related expenses?
- The RMO Unit should be your first point of contact if you have any queries regarding CME.
18. My CME reimbursement was capped by the District to my available CME balance. Can I resubmit a further claim for reimbursement of the amount that was not reimbursed when I receive my next \$2,000 entitlement?
- Yes you can resubmit the request for reimbursement provided you have remained in employment with Health NZ and the date the cost was incurred is still no more than 6 months old.
 - The RMO will be reimbursed the difference between the full reimbursement and what they had already been reimbursed previously, where the claim had been capped to the available CME balance.
19. I am considering purchasing an IT device can I purchase this through a plan and then submit a claim for reimbursement under my CME entitlement?
- No, you must buy it outright not through a payment plan.
20. Can I purchase an IT related expense such as a laptop, tablet or phone in duty free and have it reimbursed under my CME entitlement.
- Yes, IT related equipment purchased at duty free in New Zealand will be reimbursed.
 - Any IT related equipment purchased at duty free outside of New Zealand will not be reimbursed.
21. If an RMO has claimed reimbursement of a training related expense under clause 10.6 or clause 10.8, can they then claim travel and accommodation costs associated with that claim under clause 10.8.2 as part of their CME entitlement?
- No. Travel and accommodation claimed under the CME provision only relates to conferences, where those conference costs have been reimbursed as part of clause 10.8.2.
 - Where reimbursement for a training related expense has been approved and claimed under clause 10.6 or clause 10.8 (whichever applies), this includes the associated travel and accommodation related expenses as part of that provision.
22. I am a trainee and resigned my Health NZ employment to undertake a placement outside of Health NZ employment for 6 months. I will return to Health NZ employment following this 6 month placement. Will I get to retain any unspent Registrar CME entitlement under clause 10.8.2 from my previous Health NZ employment?
- Yes, where you move from Health NZ employment to employment outside Health NZ for a rural health medicine placement and this is within 12 months, provided the gaps between such employment and Health NZ employment is less than one month (before and after), you are entitled to retain any service related entitlements from your previous Health NZ employment. Where applicable this includes any unspent Registrar CME entitlement under clause 10.8.2 of the STONZ CA.
 - Where recognised, the time employed outside Health NZ will not count as service for the purposes of calculating entitlements under the CA.
 - Refer to the examples set out at scenario #4 of the CME Scenarios for further information regarding eligibility to retain service related entitlements.

23. I would like to access my Registrar CME under clause 10.8.2 for professional coaching to assist with my preparation for the college exam. Can I use Registrar CME for this purpose?
- Yes, as set out in the guidelines you can access your CME for professional coaching sessions.

CME Scenarios

Scenario #1 – Tax Treatment for IT related purchases

IT related purchases will be taxed according to current income tax legislation. These items are deemed to be equivalent to a salary payment and are subject to PAYE. IT purchases will be grossed up and reimbursement of costs paid by payroll. Tax treatment through payroll includes:

- PAYE (taxed at extra emolument rate and ACC Earners Levy)
- Kiwisaver (employee and employer contributions)
- Student Loans

Example (Registrar has no student loan deductions)

Item	\$ NZ net	GST	\$NZ Total (incl GST)	PAYE	Grossed up	Kiwisaver EMPLOYER Contribution Rate	Kiwisaver EMPLOYER contribution Amount	Kiwisaver EMPLOYEE Contribution Rate
Laptop	\$1,086.96	\$163.04	\$1,250	\$615.67	\$1,865.67	6%	\$111.94	6%

CME Balance	CME Deduction	Employee Kiwisaver deduction from Reimbursement	Amount Reimbursed
\$2,000	\$1,977.61	\$111.94	\$1,138.06

* Note PAYE calculated at 33% in example

Scenario #2 – Capped CME Reimbursement to available balance

Registrars cannot access their CME entitlement in advance of it falling due. Where the Registrar has a CME balance, but the total cost of the purchase exceeds the available CME balance, the amount reimbursed will be capped to the available CME balance for that year.

Where the amount reimbursed is capped, the GST and grossed up amounts (IT related purchases) will be recalculated based on the capped reimbursement.

* Note PAYE calculated at 33% in examples

Example 1 – GST Deducted from CME balance

Item	\$ NZ net	GST	\$NZ Total (incl GST)	CME Balance	Recalculated GST on capped	CME Deduction	Amount Reimbursed
Medical Equipment	\$521.74	\$78.26	\$600.00	\$500.00	\$75.00	\$500.00	\$575.00

Example 2 – GST not deducted from CME balance

Item	\$ NZ net	GST	\$NZ Total (incl GST)	CME Balance	Recalculated GST on capped	CME Deduction	Amount Reimbursed
Medical Equipment	\$600.00	N/A	\$600.00	\$500.00	N/A	\$500.00	\$500.00

Example 3 – IT related expense which has GST

Item	\$ NZ net	GST	\$NZ Total (incl GST)	PAYE	Grossed up	Kiwisaver EMPLOYER Contribution Rate	Kiwisaver EMPLOYER contribution Amount	Kiwisaver EMPLOYEE Contribution Rate
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Laptop	\$1,304.35	\$195.65	\$1,500	\$738.81	\$2,238.81	6%	\$134.33	6%
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CME Balance	Recalculated GST on capped	Recalculated PAYE	Recalculated Kiwisaver Employer Contribution	CME Deduction	Employee Kiwisaver deduction from Reimbursement	Amount Reimbursed
\$2,000	\$164.89	\$622.64	\$113.21	\$2,000	\$113.21	\$1,150.94

Scenario #3 - Changing union membership

Example 1

- Registrar becomes a STONZ member and is eligible for CME under clause 10.8.2. They receive the full annual entitlement of \$2,000.
- On rotation to a new employing District the registrar changes union membership. At the date of changing union membership they had an unspent CME balance of \$1,000.
- At the beginning of the next training year the registrar changes union membership again and becomes a STONZ member on rotation to a new employing District. They become eligible for CME under clause 10.8.2.
- The RMO enquires whether they still have access to their unspent CME balance of \$1,000 in addition to being granted a new entitlement at commencement of employment.

Response:

At the date of becoming an NZRDA member and being bound by that CA there was no longer an entitlement to Registrar CME under clause 10.8.2 of the STONZ CA and any unspent balance was forfeited as a result of the change to the RMOs terms and conditions.

Example 2

- Registrar becomes a STONZ member at 10 December 2020 and is eligible for CME under clause 10.8.2. They receive the full entitlement of \$2,000.
- The RMO rotates to a new employing District in April 2021 and changes union membership.
- At the date of changing union membership the Registrar had spent \$1500 of their \$2,000 entitlement and had an unspent CME balance of \$500.
- In August 2021 the RMO changes union membership again and becomes a STONZ member on rotation to a new employing District. They become eligible for CME under clause 10.8.2.
- The prorata calculation of the CME balance for the current common anniversary year (10 December 2020 to 9 December 2021) would result in the RMO receiving a CME balance of \$667.
- Is the Registrar entitled to the prorata calculation of \$667 for the CME entitlement or should the available balance be capped to \$500?

Response:

Health NZ and STONZ have agreed a common anniversary date for entitlement to the CME provision at clause 10.8.2 of the STONZ CA. This provision is portable between Districts and is capped at \$2,000 for each common anniversary year (10 December to 9 December). The Registrar qualifies for a new entitlement, but they have already been paid \$1500 in the current service year from an earlier employment and therefore can only access another \$500. The Registrar will be eligible for their next full entitlement of \$2,000 on 10 December 2021.

It is important that Districts are checking certificates of service (CoS) for all periods of employment before calculating CME entitlements under clause 10.8.2 of the STONZ CA. Any available CME balance should be recorded on the CoS as well as details of any items purchased.

Scenario # 4 – Retaining Service Related Entitlements

The following table sets out examples of where trainees are eligible to retain CME service related entitlements, when moving between Health NZ employment and employment outside of Health NZ, as part of their training.

Where service related entitlements are retained, the time employed with the non Health NZ provider will not count as service for the purposes of calculating entitlements under the CA.

Examples	CME Balance	Eligible	Reason for eligibility / additional detail
<p>Example 1</p> <p>A trainee has 12 months or less at a placement outside of Health NZ. The gap between non Health NZ employment and Health NZ employment (before and after) has been less than one month.</p>	Available CME balance at time of leaving District employment \$2,500	Yes	Retains CME balance of \$2,500 from previous District employment. Will receive next \$2,000 entitlement on common anniversary date of 10 December. This amount will be prorated where the Health NZ employment has been less than 12 months at the common anniversary date.
<p>Example 2</p> <p>A trainee has less than 12 months at a placement outside of Health NZ. The gaps between the non Health NZ employment and Health NZ employment were;</p> <ul style="list-style-type: none"> • 1.5 months between leaving Health NZ and commencing non Health NZ placement • Less than one month between leaving non Health NZ placement and commencing employment at a Health NZ District 	Available CME balance at time of leaving District employment \$2,500	No	Not entitled to retain CME balance. Although non Health NZ placement was for less than 12 months there has been a gap of more than one month prior to commencing the non Health NZ placement. Will not be entitled to receive CME entitlement under clause 10.8.2 until completion of 12 months service.
<p>Example 3</p> <p>A trainee has spent more than 12 months outside Health NZ employment in a non Health NZ placement.</p>	Available CME balance at time of leaving District employment \$2,000	No	Not entitled to retain CME balance. More than 12 months since last Health NZ employment. Will not be entitled to receive CME entitlement under clause 10.8.2 until completion of 12 months service.

CME Definitions

Term	Definition
CME	Continuing Medical Education
Grossed Up	Grossed up is the term used for calculating the tax (PAYE) payable on a net amount
GST	Good and Services Tax
IT	Information Technology
PAYE	Pay As You Earn
Tax Invoice	A legal document that shows the GST component for a transaction

Appendix 2 – Claimable and Non Claimable CME items

Guidelines for what can be claimed

The following are guidelines of what can be claimed unless specified otherwise in the individual District CME policy.

Item	STONZ CA	Comments	Amount deducted from CME is based on where purchased	
			NZ	Overseas
Textbooks not on the required reading list	Yes	For costs where Registrar cannot claim as a training related expense under clause 10.8 Includes any applicable import taxes which will be deducted off the CME balance	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Subscriptions to medical journals / vocational education websites	Yes	For costs where Registrar cannot claim as a training related expense under clause 10.8 Items in this category may also include costs associated with publishing an article in a medical journal or similar	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Any personal surgical/medical equipment	Yes	Includes any applicable import taxes which will be deducted off the CME balance Items in this category may also include any surgical/medical equipment required for College clinical exams	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Professional Coaching	No	Would be used to support an RMOs professional development such as for interview or exam coaching	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Conferences and courses	Yes	Would be used where Registrar cannot claim for the course or conference under Conference Leave clause 8.1 or Employment Related Expenses clauses 10.6 and 10.8	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Accommodation for conferences and courses	Yes	See the guidelines under travel related expenses regarding reasonable accommodation costs where accommodation arrangements are not made by the District	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Airfares to conferences and courses	Yes	See the guidelines under travel related expenses regarding reasonable accommodation costs where accommodation arrangements are not made by the District	Cost of item excluding GST deducted from CME	Total cost deducted from CME
Taxis to and from conferences	Yes		Cost of item excluding GST deducted from CME	Total cost deducted from CME
Computers/Laptops/ Tablets or similar devices i.e. iPad	Yes	One item of each per every 2 years	Grossed up cost of item including GST & Kiwisaver deducted from CME	N/A
Mobile phones	Yes	One item per every 2 years	Grossed up cost of item including GST & Kiwisaver deducted from CME	N/A
Software	Yes	Work related applications only	Grossed up cost of item including GST	Total cost plus Kiwisaver deducted from CME

			& Kiwisaver deducted from CME	
Accessories – keyboard, mouse, laptop bag	Yes	Limited to reasonable accessories only	Grossed up cost of item including GST & Kiwisaver deducted from CME	Total cost plus Kiwisaver deducted from CME

Guidelines regarding what cannot be claimed

As a guide the following cannot be claimed unless specified in the individual District CME policy;

- Airline lounge memberships
- Alcohol while attending conferences
- Payment for spouse/partner or other family member to travel
- Meals
- Phone Plans and phones purchased on a phone plan or payment plan
- Donations
- Fees associated with visa immigration requirements
- Insurance against damage, loss or theft for items of technology
- Clothing

Clause 10.9 House Officer Grant

10.9 In addition to 10.8, from 18 January 2021, House Officers (including Senior House Officers) in their second and subsequent year of service with the Employer can access a grant on the following basis:

- 10.9.1 Reimbursement to an additional maximum of \$500 per annum to support purchase of textbooks, subscriptions to journals, subscriptions to vocational education websites or attendance at conferences. The purpose of this grant is to assist them in their acceptance onto a New Zealand or Australasian vocational training programme.
- 10.9.2 Proposed expenditure for which reimbursement under this clause is sought should be discussed with the relevant educational supervisor or senior medical officer with an understanding of the entry requirements of the particular vocational programme and should be part of a House Officer's documented career plan.
- 10.9.3 The grant is portable between Districts and may only be claimed in two successive years (i.e., a maximum of \$1,000 per House Officer over two years). Any unspent amount does not carry over when the RMO is appointed to a Registrar position, where the specific provision of 10.8.2 apply.
- 10.9.4 The grant under this clause cannot be used to reimburse the purchase of IT equipment or medical/surgical equipment.

House Officer Grant – Application

Principles

This provision is to support House Officers / Senior House Officers being accepted onto a training programme. The entitlement is available to House Officers / Senior House Officers with at least one year of Health NZ service. There is no provision to recognise service outside Health NZ for the purposes of entitlement to this provision. Eligible RMOs can access this provision from 18 January 2021 which will be the common anniversary date for the operation of the provision.

Eligible RMOs (full time and part time basis), will be entitled to \$500 in expenses under the House Officer grant (“grant”) per annum for each full year of service with effect from 18 January 2021.

The grant may be accrued up to a maximum of \$1,000 and may only be claimed in two successive years and may be transferred between District employments, provided the maximum does not exceed this amount. Any unspent amount does not carry over when the RMO is appointed to a Registrar position, where the specific provision of 10.8.2 applies.

Districts should keep a record of payments made to RMOs against this grant, and include this in information on service-based employment entitlements as part of a certificate of service.

When a House Officer/Senior House Officer moves transfers between Districts their available grant balance will be transferred to the new District. Each District is responsible for ensuring all relevant information related to the grant is provided to payroll for inclusion in the transfer information, exchanged between payroll departments, for employees transferring within Health NZ. Claims for expenses under the grant will not be processed or approved until this information has been received and confirmed.

Common Anniversary of 18 January

All House Officers / Senior House Officers will have a common anniversary of 18 January each year. The annual grant entitlement will be pro rata in the first common anniversary year where:

- The RMO already has 12 months continuous service in a District at the date they become covered by the STONZ CA, where this is after the common anniversary of 18 January. The first full entitlement will fall due on the next common anniversary date the following year.
- The RMO completes 12 months continuous service and becomes eligible part way through the common anniversary year. The first full entitlement will fall due on the next common anniversary date the following year.

Guidelines for Claims for Expenditure

Reimbursement of expenses must be discussed with the relevant educational supervisor or SMO and align with the RMOs career plan.

Claims for expenditure will be recorded against the grant based on the date the cost is incurred.

Claims cannot exceed the available balance under the grant. Advances to this entitlement are not permitted. Where the total cost of the purchase exceeds the available balance under the House Officer grant, the amount reimbursed will be capped to the available balance for that year.

House Officer Grant Frequently Asked Questions (FAQs)

1. What are the eligibility criteria for the \$500 House Officer grant under clause 10.9?
 - At a minimum you must be a House Officer or Senior House Officer in your second and subsequent year of Health NZ service (PGY2 or above). There is no provision to recognise service outside Health NZ for the purposes of entitlement.
 - There is no entitlement to the House Officer grant in your first year of Health NZ service irrespective of your year of the House Officer salary scale.
2. What does the term “common anniversary year” mean in relation to the grant at clause 10.9?
 - Health NZ and STONZ as part of implementation of clause 10.9 have agreed a common anniversary date. This means that eligible RMOs will receive the yearly entitlement under this clause on 18 January each year, up to a maximum accrued entitlement of \$1,000.
 - Where an RMO becomes eligible after the 18 January common anniversary year date their first \$500 entitlement will be prorated.
3. How is the grant calculated where I become eligible after the commencement of the current common anniversary year?
 - When eligibility falls due after the 18 January common anniversary year date the balance will be prorated for the current common anniversary year. See example as follows;
 - Common anniversary year date is 18 January 2021 to 17 January 2022
 - House Officer becomes eligible 18 July 2021 which equates to 6 months prorata entitlement of \$500.00
 - Available balance at eligibility date of 18 July 2021 is \$250.00 for the period 18 July 2021 to 17 January 2022
 - First full entitlement of \$500.00 falls due on next common anniversary year date of 18 January 2022
4. Can I carry over any unspent balance of my grant into my Registrar CME provision under clause 10.8.2?
 - No, any unspent balance is not transferable.
5. What types of expenses can I claim for under this clause?
 - The following types of items can be claimed where they are not already available for reimbursement under the national reimbursement lists;
 - Text books

- Subscriptions to journals and / or vocational education websites
 - Attendance at conferences
 - Professional coaching to assist with preparation for training programme interviews
 - Other relevant items that assist with acceptance onto a New Zealand or Australasian vocational training programme, where it is relevant to the RMO's career plan, and it would otherwise not be reimbursed under clause 10.8
- You are NOT entitled to claim the following under this provision;
 - IT related equipment including phone plans
 - Airline lounge memberships
 - Alcohol while attending conferences
 - Clothing and medical/surgical equipment
 - Donations, fees associated with visa immigration requirements
6. I am currently employed as a Registrar but will be stepping down to a House Officer position for a run rotation can I use my Registrar CME under clause 10.8.2 whilst I am employed as a House Officer?
- No, you cannot access your Registrar CME balance under clause 10.8.2 of the STONZ CA whilst you are employed as a House Officer.
 - On commencement of your House Officer position you will be eligible for the House Officer grant of \$500 under clause 10.9 of the STONZ CA (providing you meet the eligibility criteria). This requires one year of Health NZ service, if you were an international medical graduate (IMG) who'd gone into a Registrar position and stepped down whilst still in your first year of service, you will need to complete a year of service before being eligible for the House Officer grant; also providing that you haven't already accessed the grant whilst employed as a House Officer previously.
 - You will be able to access any unspent Registrar CME balance that you had owing to you prior to stepping down to the House Officer position, once you return to your Registrar position. This will only apply where you have been continuously employed and have not had a break in service of 3 months or more.
7. I would like to access my House Officer Grant under clause 10.9.1 for professional coaching to assist with my preparation for an Anaesthetics SHO interview. Can I use my House Officer Grant for this purpose?
- Yes, you can access your CME for professional coaching sessions.

House Officer Grant Scenarios

Scenario #1

- A House Officer becomes a STONZ member on 18 January 2021 and commences their second year of service (PGY2) on 10 May 2021
- The House Officer is eligible for the House Officer Grant from 10 May 2021 because they have completed 12 months of service
- The common anniversary year for the grant commenced on 18 January 2021

Answer

- The entitlement is pro-rated for the first common anniversary year for the period 10 May 2021 to 17 January 2022
- The House Officer is granted a balance of **\$346.58** at **10 May 2021** (date of eligibility)
- The next common anniversary year falls due on **18 January 2022** they receive **\$500**
- The maximum a House Officer can receive under the House Officer grant is a total of \$1,000. If they remain a House Officer at **18 January 2023** they will receive **\$153.42** which is the residual of the total grant of \$1,000 under this provision.

Entitlement	10-May-2021 to 17-Jan-2022	18-Jan-2022 to 17-Jan-2023	18-Jan-2023 to 17-Jan-2024
Amount of HO Grant	\$346.58	\$500.00	\$153.42
Total Cumulative	\$346.58	\$846.58	\$1,000.00

Comparison STONZ and NZRDA CAs

The following table sets out where there are differences between the STONZ CA and NZRDA CA. Where there is no difference between clauses no detail has been provided in the comparison table.

	STONZ CA Clause 10	NZRDA CA Clause 28
Costs of Training	<p>Clause 10.6.1</p> <p>Districts will reimburse to Training Registrars actual and reasonable costs of the training undertaken to obtain vocational scope of practice.</p> <p>Clause 10.8</p> <p>Non-Training Registrars and House Officers (PGY2 and above) will be reimbursed costs pertaining to facilitating their acceptance onto a vocational training programme.</p>	<p>Clause 28.6</p> <p>Districts reimburse actual and reasonable costs of the training undertaken in the pathway to obtain vocational scope of practice.</p> <p>Silent on RMO type</p>
Escalation of Disputes	<p>Clause 10.8.1</p> <p>Disputes regarding particular costs and the relevance to progression towards a vocational pathway shall be referred to the Chief Medical Officer (or their delegate) for resolution and in consultation with department clinical lead.</p>	Silent on this
CME	<p>Clause 10.8.2</p> <p>For each full year of service Registrars (subject to eligibility) receive a CME allowance of \$2,000 to aid in training.</p> <p>Entitlement moved to a 1 February – 31 January year basis from 2025.</p> <p>Clause 10.8.3</p> <p>Can accrue up to a maximum of \$6,000. Portable provision between Districts.</p> <p>Clause 10.8.4</p> <p>As part of aligning the entitlement in 10.8.2 to the new RMO rotation dates, and as a one off, an allocation of \$300 for the period from 10 December 2024 to the 31 January 2025, and the maximum accrual will be extended to \$6,300 between 31 January 2025 and 31 January 2027.</p>	No provision for CME
House Officer Grant (effective from 18 January 2021)	<p>Clause 10.9</p> <p>For each full year of service House Officers including Senior House Officers (subject to eligibility) receive a grant of \$500 to support being accepted onto a training programme.</p>	No provision for House Officer grant

	The grant may be accrued up to a maximum of \$1,000 and may only be claimed in two successive years and may be transferred between District employments, provided the maximum does not exceed this amount. Any unspent amount does not carry over when the RMO is appointed to a Registrar position, where the specific provision of 10.8.2 applies.	
Maximum exam attempts reimbursed	The District will reimburse up to three attempts to sit College exams with the approval of the appropriate clinical lead. Where there are extenuating circumstances, and this is supported by the relevant College, the service may, at its discretion, support further examination attempts.	Silent on any limit

Forms, Templates and Other Resources

The following tools form part of clause 10 Employment Related Expenses. These resources are available on the website where the National Manual is hosted under Clause 10 Employment Related Expenses.

Resource	Comment
Reimbursement List Request Form – Addition or Removal of Item	The form used to request that an item be added or removed from the Reimbursement Lists
CME Claim Form – example	Example of CME Claim form used by the three Auckland metro Districts
Registrar CME and House Officer Grant calculator	An excel format calculator used to calculate Registrar CME balances and House Officer Grant balances when these need to be prorated for the first common anniversary year
Summary of Vocational Training Requirements – Part 1 Exams or Equivalent	Provides a list of all the Specialty Colleges and a summary of the vocational training requirements which includes the Part One Exams or equivalent