

# Claiming professional development support and leave – Medical Officer Work Instruction

|                      |               |                            |                      |
|----------------------|---------------|----------------------------|----------------------|
| <b>Document ID:</b>  | WI-PAL-222222 | <b>Version number:</b>     |                      |
| <b>Release date:</b> | 27 Feb 2020   | <b>Approval authority:</b> | Chief People Officer |

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**Release date:** 27/02/2020

**Document Type:** 04 WIN - Work Instruction  
**Version number:** 1  
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# 1. Introduction

## 1.1 Purpose

This work instruction outlines the steps Medical Officers use to apply for Professional Development Support (PDS), and the process that Managers use to manage and approve a Medical Officer's application. Approved PDS can take the form of:

- a) Leave to attend a professional development activity during a rostered shift;
- b) Payment for time spent attending a professional development activity outside a rostered shift;
- c) Reimbursement of expenses incurred due to undertaking a professional development activity (for RMOs only).

## 1.2 Scope and context

This work instruction applies to Mater Medical Officers eligible under the *Mater Resident Medical Officers' Enterprise Agreement 2018 – 2021* (RMOs), *Mater Health Services Senior Medical Officers' Enterprise Agreement 2015* (SMOs), and *Mater Health Services Visiting Medical Officer Enterprise Agreement 2015* (VMOs).

## 1.3 Governing documents

Relevant enterprise agreements

| Document title                                                                             |
|--------------------------------------------------------------------------------------------|
| <a href="#">Mater Resident Medical Officers' Enterprise Agreement 2018 – 2021</a>          |
| <a href="#">Mater Health Services Senior Medical Officers' Enterprise Agreement 2015</a>   |
| <a href="#">Mater Health Services Visiting Medical Officers' Enterprise Agreement 2015</a> |

## 1.4 Required equipment, systems and tools

Employees require access to the following systems and / or tools:

- Mater Service Desk Portal
- MyHR self-service access to view PDL and PDA under Leave balances
- Mater Intranet HR Portal for Professional Development Support application form

Managers require access to:

- Kronos to complete leave scheduling

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## 1.5 Trigger event

This work instruction commences when a Medical Officer indicates his/her interest in participating in a professional development activity and completes a Professional Development Support and / or a Reimbursement form, initiating the PDA reimbursement process.

## 1.6 Expected outcomes

The following outcome(s) are expected upon completion of this work instruction:

- Professional development support accruals are correctly reflected in Mater payroll system
- Professional development leave accruals are correctly reflected in Mater payroll system
- Mater finance costings are correctly reflected
- Mater employee receives professional development support

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## 2. Criteria for assessing Professional Development Support

### 2.1 Resident Medical Officers

| Step | Instructions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p>The Medical Director will consider the following criteria when assessing the application for professional development support:</p> <ul style="list-style-type: none"> <li>○ The professional development activity is undertaken whilst employed by Mater and:               <ul style="list-style-type: none"> <li>● Directly contributes to improved outcomes for patients or services;</li> <li>● Aligns with the strategic direction of the department and Mater Misericordiae Ltd;</li> <li>● Benefits the RMO's chosen career pathway;</li> <li>● The information or skills acquired through the professional development activity can be disseminated across the department and what materials or change of practice will be developed or implemented as a result of attending.</li> </ul> </li> </ul> <p>The approval of leave is also subject to:</p> <ul style="list-style-type: none"> <li>● The staffing levels and business need at the time of the leave;</li> <li>● The number of medical officers from the same area/ department applying to attend the same professional development activity;</li> <li>● If the professional development activity is to be conducted interstate or overseas, and whether or not the same professional development activity is conducted locally.</li> </ul> <p>For clarity, the following are not considered items which meet the above criteria in relation to a request for reimbursement:</p> <ul style="list-style-type: none"> <li>● Electronic devices (e.g. computers, laptops, tablets, iPads etc.)</li> <li>● Computer software licences</li> <li>● AHPRA registration</li> <li>● Cost of travel/ accommodation/ meals</li> </ul> |
| 2.   | <p>The Director will ensure the employee is advised in writing of the outcome of their application.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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## 2.2 Senior Medical Officers & Visiting Medical Officers

| Step | Instructions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | The Medical Director will consider the following criteria when assessing the application for professional development leave: <ul style="list-style-type: none"> <li>○ The professional development activity is undertaken whilst employed by Mater and:               <ul style="list-style-type: none"> <li>• Contributes to individual professional development in the Medical Officer's current field of practice or training;</li> <li>• Directly contributes to improved outcomes for patients or services;</li> <li>• Aligns with the strategic direction of the department and Mater Misericordiae Ltd.</li> </ul> </li> </ul> |
| 2.   | The Director will ensure the employee is advised in writing of the outcome of their application.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## 3. Applying for Professional Development Leave

Upon identifying that a professional development opportunity exists the Medical Officer makes an application for PDS. The PDS application outlines the nature of the activity the Medical Officer is seeking support for, and whether the activity applied for will take place within or outside the Medical Officer's ordinary hours of work (i.e. rostered shift).

| Step | Instructions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <ul style="list-style-type: none"> <li>a) Complete a Professional Development Support Application form</li> <li>b) Attach supporting documentary evidence.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 2.   | For <b>RMOs ONLY</b> : <ul style="list-style-type: none"> <li>a) Submit Professional Development Support application together with documentary evidence to the Director, or supervising Consultant for approval. The supervisor who approves the form must be the direct supervisor at the time the leave will be taken.</li> <li>b) Rotational RMOs must then send PDS application and evidence of supervising consultant's approval to Medical Education Unit for completion of request.</li> <li>c) Where the Medical Officer is also claiming PDA go to <b>Section 6. Requesting Professional Development Allowance</b></li> </ul> |
| 3.   | For <b>SMOs and VMOs ONLY</b> : <ul style="list-style-type: none"> <li>a) Submit Professional Development Support application together with documentary evidence to the relevant Medical Director.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 4.   | The Medical Officer's application for PDS will be assessed by the relevant Medical Director or delegate. <ul style="list-style-type: none"> <li>a) The application will either be approved or not approved.</li> <li>b) The Medical Officer will be notified of the outcome by relevant Medical Director or authorised delegate</li> </ul>                                                                                                                                                                                                                                                                                             |
| 5.   | If the application for PDS is approved:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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| Step                       | Instructions                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                            | a) Where the activity is within ordinary hours the Medical Director or authorised delegate updates Kronos to reflect approved PDL days where relevant (i.e. for professional development activities undertaken during rostered shift).<br>b) Where the activity is outside ordinary hours the Medical Director forwards approved application to Payroll to be processed. |
| <b>End of instructions</b> |                                                                                                                                                                                                                                                                                                                                                                          |

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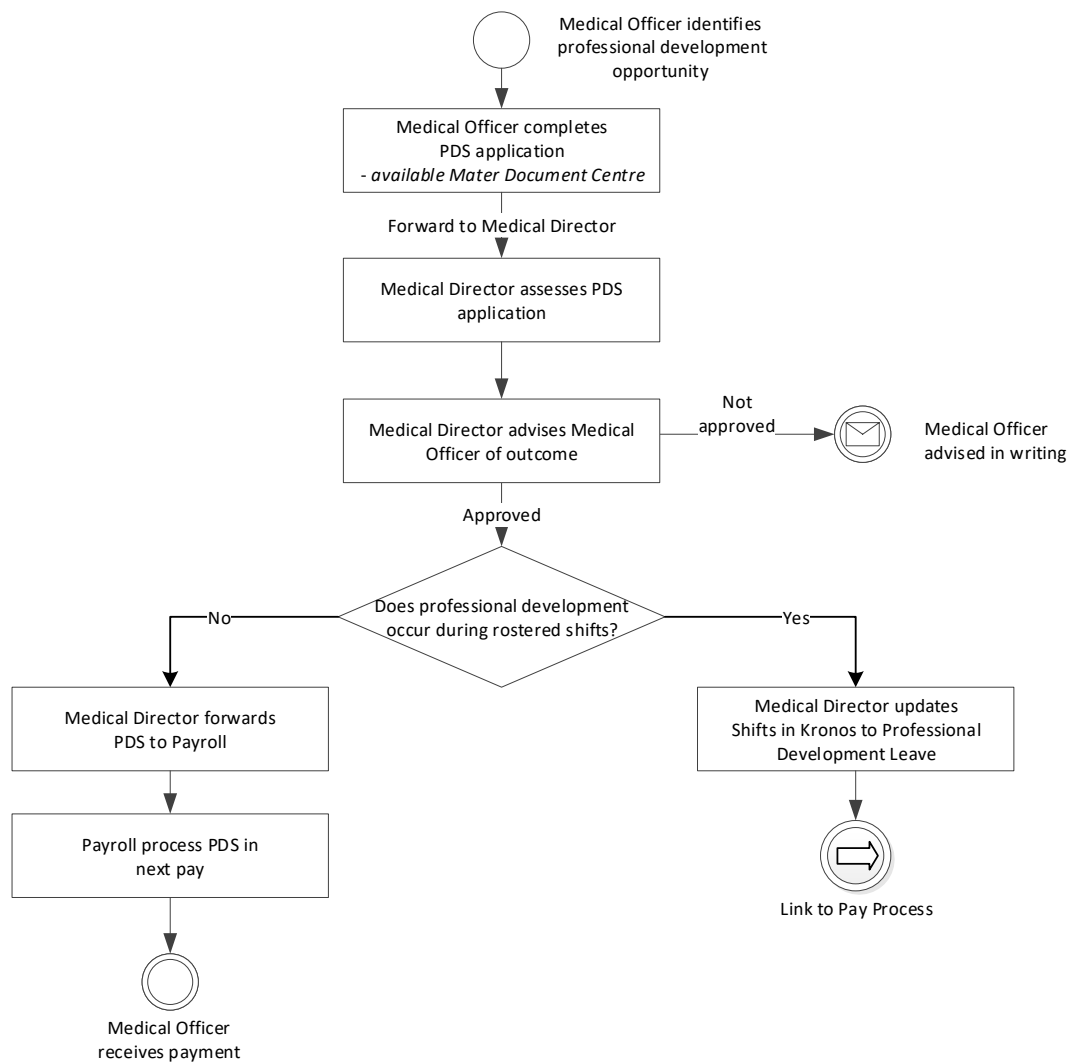
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## 4. Professional Development Support (PDS) workflow – Medical Officer

### Professional Development Support (PDS) workflow

Audience: Medical Officer, Medical Director



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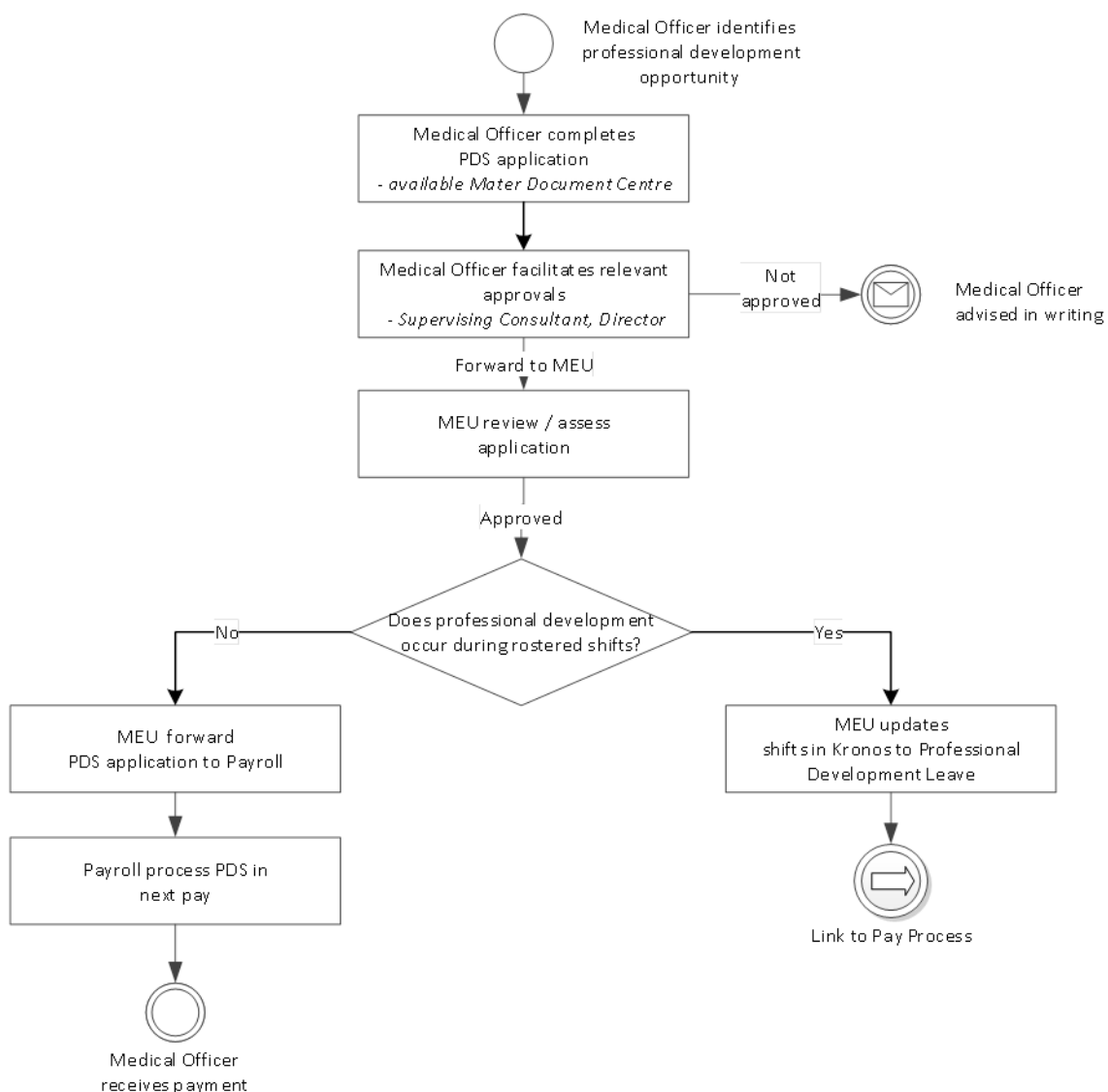
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## 5. Professional Development Support (PDS) workflow – Rotational RMO

Professional Development Support (PDS) workflow  
- Rotational RMO

Audience: Rotational RMO, Medical Director, Medical Education Unit



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## 6. Requesting Professional Development Allowance reimbursement – RMOs

| Step                       | Instructions                                                                                                                                                                                                                                                                                                                                                                                     |                  |                    |                  |                                                                                                                                                                         |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|--------------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.                         | RMO navigates to the Professional Development Reimbursement form:<br>Mater Service Desk Portal > Group Finance > Professional Development Reimbursement form                                                                                                                                                                                                                                     |                  |                    |                  |                                                                                                                                                                         |
| 2.                         | RMO attaches relevant tax invoice/s and tax receipt/s                                                                                                                                                                                                                                                                                                                                            |                  |                    |                  |                                                                                                                                                                         |
| 3.                         | RMO provides to relevant Director for approval.<br>If rotational RMO - provide to MEU for review and facilitation of approval                                                                                                                                                                                                                                                                    |                  |                    |                  |                                                                                                                                                                         |
| 4.                         | Relevant Director approves or declines request: <table border="1" data-bbox="343 719 1350 913"> <tr> <td>Request approved</td> <td>Continue to Step 5</td> </tr> <tr> <td>Request declined</td> <td>Director advises RMO request declined.<br/>- Feedback to be given in writing to employee regarding reason for the application being declined at the time of notification</td> </tr> </table> | Request approved | Continue to Step 5 | Request declined | Director advises RMO request declined.<br>- Feedback to be given in writing to employee regarding reason for the application being declined at the time of notification |
| Request approved           | Continue to Step 5                                                                                                                                                                                                                                                                                                                                                                               |                  |                    |                  |                                                                                                                                                                         |
| Request declined           | Director advises RMO request declined.<br>- Feedback to be given in writing to employee regarding reason for the application being declined at the time of notification                                                                                                                                                                                                                          |                  |                    |                  |                                                                                                                                                                         |
| 5.                         | Relevant Director (MEU for rotational RMOs) forward request to Human Resources and advise Medical Officer of outcome                                                                                                                                                                                                                                                                             |                  |                    |                  |                                                                                                                                                                         |
| 6.                         | HR adjust balances according to approved reimbursement form                                                                                                                                                                                                                                                                                                                                      |                  |                    |                  |                                                                                                                                                                         |
| 7.                         | HR forward the form to Finance – Accounts Payable                                                                                                                                                                                                                                                                                                                                                |                  |                    |                  |                                                                                                                                                                         |
| 8.                         | Accounts Payable process the reimbursement form                                                                                                                                                                                                                                                                                                                                                  |                  |                    |                  |                                                                                                                                                                         |
| 9.                         | RMO receives reimbursement directly to nominated bank account                                                                                                                                                                                                                                                                                                                                    |                  |                    |                  |                                                                                                                                                                         |
| <b>End of instructions</b> |                                                                                                                                                                                                                                                                                                                                                                                                  |                  |                    |                  |                                                                                                                                                                         |

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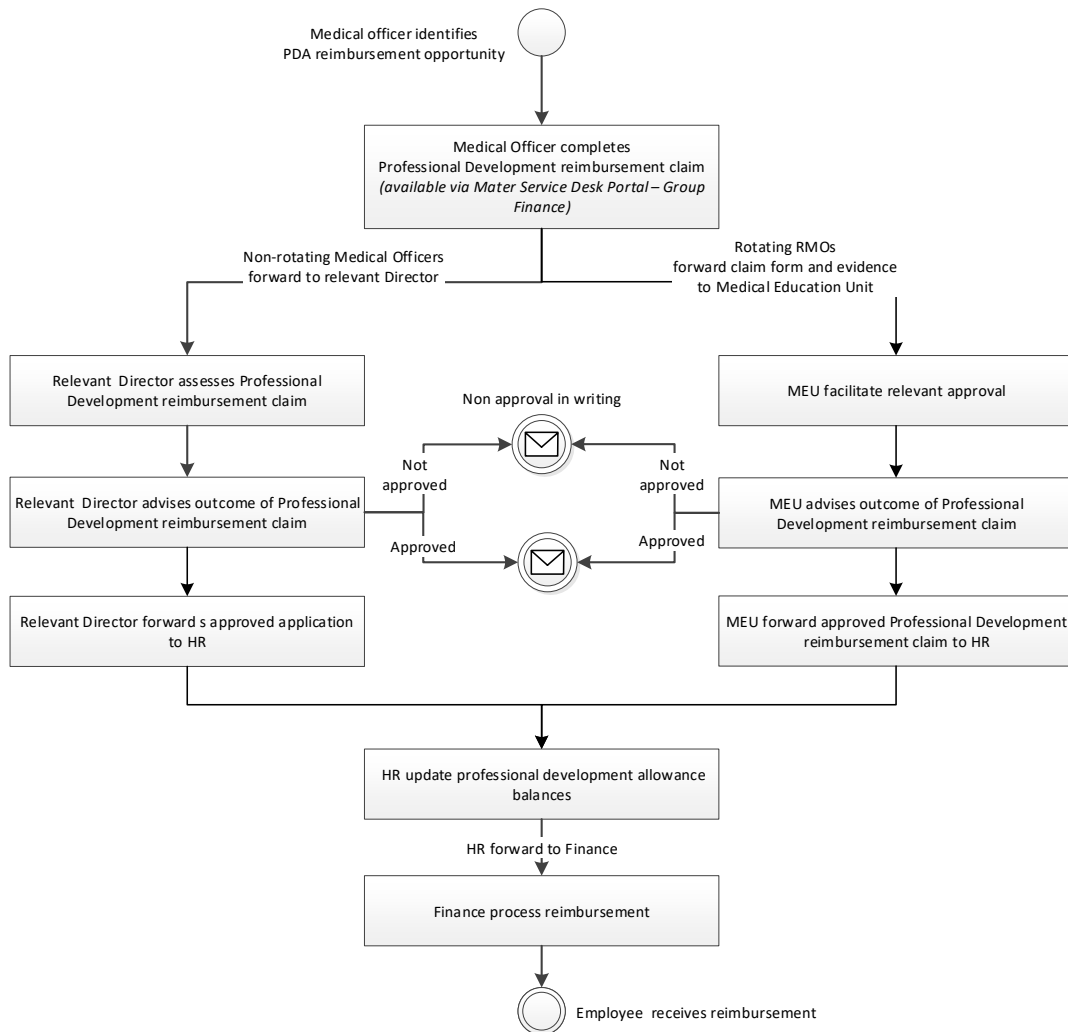
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## 7. Professional Development Allowance reimbursement workflow – RMO

Professional Development Allowance reimbursement workflow  
- refer to relevant EA for eligibility



## 8. Documents related to this work instruction

### Mater Documents

| Document Type | Document ID | Document Title |
|---------------|-------------|----------------|
|---------------|-------------|----------------|

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| Document Type | Document ID   | Document Title                                                 |
|---------------|---------------|----------------------------------------------------------------|
| Procedure     | PY-PAL-020001 | Leave Policy                                                   |
| Forms         | NF-PAL-222222 | Professional Development Support application – Medical Officer |
| Other         |               |                                                                |

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## 9. Document controls

### 9.1 Document revision history

| Version | Release date | Description                                                                                                                                                                 | Risk-rated Review date |
|---------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| 1.      | 27 Feb 2020  | Replaces procedure PR-PAL-222222 Medical Officer Professional Development Support and Leave and update of content to reflect relevant EAs. Includes updates from MEU review | mmm yyyy               |
|         |              |                                                                                                                                                                             |                        |

### 9.2 Document review and approval

| Name<br>Person/committee | Position<br>If applicable           | Function<br>Owner/author/review/approve |
|--------------------------|-------------------------------------|-----------------------------------------|
| Karen Cicero             | Former Director Employee Relations  | Document owner                          |
| Sue Beuth                | Payroll Services Manager            | Document author                         |
| Claire Morgan            | Chief Medical Officer               | Key stakeholder/s consulted             |
| Moirra Roosmale-Cocq     | Senior Industrial Relations Adviser | Review                                  |
| Sharron McMahon          | Chief People Officer                | Approve                                 |
| Olivia Paton             | Medical Education Manager           | Key stakeholder/s consulted             |

### 9.3 Keywords Indexing

|                   |                                                                                                      |
|-------------------|------------------------------------------------------------------------------------------------------|
| <b>Key words:</b> | Professional Development leave, Professional Development support, application process, PDL, PDS, PDA |
|-------------------|------------------------------------------------------------------------------------------------------|

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