

SAN MATEO COUNTY
BEHAVIORAL HEALTH AND RECOVERY SERVICES

DATE: December 30, 1996

BHRS POLICY: 96-06

SUBJECT: Education Leave/Training Guidelines

AUTHORITY: Divisional

SUPERSEDES: Mental Health Policy 91-03

AMENDED: February 10, 1999, May 1, 2001, August 30, 2003, February 15, 2005,
February 14, 2008, June 9, 2010

Attachments

- A. Request for Educational Leave with Pay
- B. Request for Tuition Reimbursement (County form)
- C. Guidelines for Tuition Reimbursement (County form)
- D. Request for Reimbursement for Professional Dues, Fees, CME or CEU Courses, or Clinical Training Materials (Health Department form)
- E. Educational Leave/Training Guidelines

POLICY

The primary responsibility of Behavioral Health and Recovery Services (BHRS) staff is the provision of high quality client care and behavioral health services to the community. In order to maintain and enhance employee skills, in-service training and other training opportunities will be made available by the division

Further, the increased use of the Internet for Continuing Medical Education (CME) and Continuing Education Units (CEU) has created the need to articulate measures to secure the privacy and confidentiality of personal information of participants taking Internet courses. To this end, the BHRS Professional Education Committee and the BHRS Quality Management Team will take reasonable measures to protect the privacy of staff enrolled in Internet courses provided by BHRS that lead to CME and CEU credit. The personal information of participants will be kept confidential and will not be available to individuals outside of the San Mateo County Health System. The CME programs will only gather information relevant to planning, conducting, and/or evaluating continuing medical education and/or continuing professional education.

PROCEDURE

Within the following procedural guidelines, all requests for education leave should be submitted to the immediate supervisor in writing a minimum of two weeks in advance of the expected course or educational leave. Upon approval by unit supervisor, requests will be forwarded to division management for further review and decision. Exceptions are in-service training and directed training where the training is initiated by the supervisor. Any additions or changes to this procedure will be noted in the specific sections below. (Note: Any additional or alternate language concerning training in a specific bargaining unit's Memo of Understanding [MOU] takes precedence over the following general information.)

I. EDUCATION LEAVE/ELECTIVE TRAINING

Employee-initiated requests for training should be related to the employee's present job classification, and be reasonably likely to improve or enhance job performance. This type of training will continue to be individually considered and subject to limitations. The general conditions for elective training are as follows:

A. Approval

Printed material describing the training and the dates such training is offered must accompany the request.

A maximum of 40 hours per fiscal year will be allowed for full-time employees, unless training is directed as described in Section VI. (See exception, below.)

Allowances for part-time employees will be based upon their scheduled workweek.

Allowances for VTO employees will be as follows:

- 10% VTO - 36 hours
- 5% VTO - 38 hours
- 2% VTO - 39 hours

Extra-help staff do not qualify.

Coverage for employee's caseload must not present a hardship to the unit.

Exception:

Physicians: All physicians, whether full or part time, receive 80 hours of educational leave per fiscal year as per union agreement. Part time physicians who were union members of the county on or before August 25, 1995, will receive an additional 0.45 hours of educational leave per pay period. There shall be no specified requirement for the granting of this leave.

For all physicians, if 80 hours are not used in one fiscal year, up to 40 hours can be rolled over into the next fiscal year for a maximum of 80 hours of educational leave in a two fiscal year period.

B. Reimbursement

Only regular work time during regular work hours will be paid by Behavioral Health and Recovery Services; e.g., eight hours maximum per work day for a full-time employee and proportionally for part-time staff. Training offered on weekends is not eligible for educational leave.

There will be no reimbursement for travel, tuition, registration, or books.

Exceptions:

Physicians:

- will receive reimbursement for registration, books and tuition.
- may seek both time and tuition (including home study courses).

Nurses:

- may be reimbursed for training offered on weekends or other off days.
- may receive tuition reimbursement at current usual costs (up to \$90 for six CEU's).
- may seek both time and tuition (including home study courses):
- **need to complete two forms:**
 1. Request for Educational Leave with Pay (Attachment A), and
 2. Request for Tuition Reimbursement (Attachment B).

C. Reporting

For educational leave, timecards will be coded 057.

Nurses will use code 064 for special educational reimbursement recognizing years of service.

II. HOME STUDY - EDUCATION LEAVE

A. Approval

Requests must include a copy of the syllabus or other material identifying the specific course(s) to be taken. All home study shall offer CEUs appropriate to the discipline of the employee.

B. Reimbursement

For staff (other than physicians and nurses), a maximum of eight hours of home study shall be approved in a fiscal year; these eight hours shall be included within the maximum (40 hours) of education leave for full-time employees, and within the prorated maximum leave for other categories of employment.

The employee shall submit evidence of successful completion of the course and award of CEU's; this will be filed in his/her personnel file. The employee shall further document, in writing, the actual hours spent taking this course.

In the case of non-completion of a course, the employee must apply through his/her payroll clerk for timecard adjustment.

Exception:

Physicians, based on existing MOU, will be allowed 40 hours of home study each fiscal year under prescribed policies for the purpose of completing their continuing educational requirements for licensure.

Up to five days of home study may be taken immediately preceding a board exam, and a sixth day for the actual exam. Requests for exam-related home study do not need to be accompanied with a course syllabus or evidence of earned CEUs.

Nurses, based on the 2009-2011 MOU, may request to do home study C.E. courses on regularly scheduled days off, and may opt to use any or all of the allowed hours for home study.

Other Professions

Up to eight hours of home study may be taken immediately preceding a licensing exam, and one day for the actual exam. Requests for exam-related home study do not need to be accompanied with a course syllabus or evidence of earned CEUs. (Note: this time will be prorated for part-time employees).

C. Form

Use form: Request for Educational Leave with Pay (Attachment A).

D. Reporting

Timecards will be coded 057.

III. EDUCATIONAL LEAVE FOR TAKING EXAMS OR MEDICAL BOARDS

A. Approval

Advance approval shall be obtained from the staff member's supervisor and manager.

B. Reimbursement

Behavioral Health and Recovery Services will accept Educational Leave requests for employees taking clinical licensure or Medical Boards (2 days).

C. Form

Use form: Request for Educational Leave with Pay (Attachment A).

D. Reporting

For Educational Leave, timecards will be coded 057.

IV. DIVISIONAL TUITION REIMBURSEMENT FOR CLINICAL LICENSE COURSE

A. Approval

Advance approval shall be obtained from the staff member's supervisor and manager.

B. Reimbursement

Reimbursement will be considered for no more than one course for written test preparation and one course for one oral test preparation. The maximum amount for reimbursement per course is \$200, for total maximum of \$400.

Exception:

Physicians, Board review tuition will be covered up to \$2000.00.

Physicians may receive \$25.00 in book reimbursement per college-level course.

C. Form

Use form: Request for Tuition Reimbursement (Attachment B).

Exception:

Physicians: Use form Request for Reimbursement for Professional Dues, Fees, CME Courses or Clinical Training Materials (Attachment D). The maximum amount for reimbursement per fiscal year is \$2000.00.

D. Reporting

Courses occurring during a regular work schedule shall be taken on the employee's own time.

Exception:

Physicians may request both educational leave and tuition reimbursement.

V. INSERVICE TRAINING

This training is generally organized and conducted by Behavioral Health and Recovery Services. It usually takes place within county facilities and is related to specific training needs indicated by division staff. Generally, staff are strongly encouraged to attend.

A. Approval

Supervisor's verbal approval is needed.

All staff members are encouraged to attend job relevant training. Some trainings may be mandatory.

B. Reimbursement

The division will bear any costs associated with this training, e.g., staff salary, mileage, materials.

C. Form

No form is required.

D. Reporting

Time cards (ATKS) will be coded 001 for trainings of one to three hours such as Grand Rounds.

Time cards (ATKS) will be coded 058 for half-day or full-day trainings. The name of the course/training attended should be entered in the comments section of the time card (ex.: Co-Occurring Disorders Training).

VI. DIRECTED TRAINING

In this situation, the employee is mandated to attend training; therefore, all time and expenses are reimbursed by the division.

A. Approval

Directed training is initiated by the supervisor and must have the approval of the program manager.

B. Reimbursement

All costs associated with the training will be reimbursed by the division including tuition, registration, materials, and travel costs.

C. Form

No form is required.

D. Reporting

Time cards (ATKS) will be coded 058. The name of the course/training attended should be entered in the comments section of the time card (ex.: Co-Occurring Disorders Training).

VII. TUITION REIMBURSEMENT PROGRAM BY COUNTY HUMAN RESOURCE DEPARTMENT

A. Approval

Courses taken on employees own time may be approved for reimbursement. Course will not be approved unless the paperwork indicates the employee was on off-duty status.

B. Reimbursement

This program will reimburse tuition costs for certain workshops and courses with advance approval from BHRS and the Human Resources Department. Workshops must be focused on furthering skills in a single area of expertise. Conferences that offer a variety of subjects are not eligible for reimbursement. Care should be taken to fill out forms completely and legibly.

The county allows for a maximum dollar reimbursement. Check with Payroll Personnel Specialist for specific dollar amount.

Within 30 days of receiving your school grade report or certificate of completion, complete a Demand on the Treasury form and attach the appropriate documentation. Incomplete claims may be delayed or denied.

C. Use form: Request for Tuition Reimbursement (Attachment B).

Tuition Reimbursement Request forms must be sent to your Payroll Personal Specialist at least two weeks (10 working days) prior to the start of class. The

request form must be complete and have the appropriate attachments. Tuition Reimbursement Request Forms received late or incomplete or not having the appropriate attachments may be delayed or denied.

D. Reporting

All courses approved for this program must be attended during off-duty hours on your own time. You cannot receive both paid time and tuition reimbursement.

Exception:

Physicians and Nurses, Per MOU, can request both tuition reimbursement and educational leave with pay.

Approved: Signature on File
Louise Rogers, Director
Behavioral Health and Recovery Services

Reviewed: _____

