TABLE OF CONTENTS

Target Audience and Setting 2
Purpose 2
Definition 2
Procedure 2
General CME Claim Principles 2
CME leave Entitlement 3
Applying for CME Leave 3
Travel days and Recovery days 4
CME Eligibility 4
Full time and Fractional SMS 4
Calculation of CME Entitlement 4
Changes in Hours 5
Carry over 5
Special Carry over provision 5
Reimbursable Expenses 5
Conference Expenses 5
Travel Expenses 6
Air Travel 6
Frequent Flyer Schemes & Incentives 6
Travel Insurance 7
Private Car Use 7
Car Hire 7
Parking Costs 7
Accommodation 7
Meals and Incidental expenses 8
Per Diem in advance 8
Portable Technological Aids 9
Laptop / Notebook expenses 9
Smartphones / Tablets and Camera Expenses 9
Non Portable Information Technology Devices 10
CME **Category Expenses (Devices & Accessories)** 12-18
Journal Article Publishing Expenses 189
Expenses not considered CME 189

Claim timeframes 19
Reimbursement process 19
Assessment and payment timeframes 20
Gifts, sponsorship and conflicts of interest 20
Dispute Claims Resolution 20
Payment Summary (Group Certificate) 21
GST or VAT 21
Fringe Benefits Tax and the principal purpose of travel 21
CME Claim Duplication & Fraud 22
CME Audit Process 22

TARGET AUDIENCE and SETTING

Senior Medical Staff who have been employed by Monash Health.

PURPOSE

The purpose of this procedure is to provide guidance to Senior Medical Staff who are eligible to claim their entitlement directly related to their professional development. This document is to assist Specialists in their planning of their Continuous Medical Education (CME).

DEFINITION

Continuous Medical Education is the process by which Specialists engage in activities designed to support their continuing professional development. Activities are derived from multiple domains, are learner centred and support the ability of those professionals to provide high quality, comprehensive and continuous patient care and service to the public and their profession.

PROCEDURE

General CME Claim Principles

- A reimbursable educational activity or conference will satisfy the general principles that:
  - It is substantially applicable to the work for which the doctor is employed;
  - It enhances the personal professional education of the doctor; and
  - It would satisfy the relevant college's criteria for continuing professional education.
- Claims must be submitted within the financial year in which the expense has been paid and within 3 months (by 30th September) from the end of the financial year. Receipt / invoice and or proof of payment must be within the financial year in which the claim is being submitted.
- Monash Health at its absolute discretion may require that the SMS report to the Executive and/or to the medical cohort on the knowledge or skills acquired by undertaking the approved CME activity

- Although the maximum CME support entitlement available to a Specialist is described on an annual basis, the Specialist does not have to be employed by a Health Service (or Health Services) for the full financial year to have access to that maximum annual amount. There is no 'pro-rata' adjustment to the maximum annual amount available based on the Specialist doctor's period of employment. For example, a full time Specialist doctor commencing on the first week of February is entitled to the full year's allocation for the period February-June 30th of that year; the new annual entitlement becomes available in July of that same year.

- CME entitlements are based on contracted hours. The CME entitlement will adjust throughout the financial year based on any update or variation to contracted hours.

- Where CME funding support was provided to Specialists through internal funds prior to 1 July 2006 (including private practice and special purpose or similar funds) those arrangements will be unchanged. This is considered the reimbursement baseline for that individual/position. In these situations, first call for funded support will be made on already existing funding sources. The annual maximum reimbursement is not affected by this baseline.

CME leave Entitlement

To undertake CME activities e.g. attend a relevant conference, take a relevant course etc, Monash Health will make CME leave available to full time and fractional SMS who have an appointment with Monash Health.

Full time SMS are entitled to 10 days (two weeks) conference leave each year on full pay, with fractional SMS having a pro-rata entitlement.

Specialists who as part of their normal duties are regularly rostered to work weekends, may claim weekend days as paid conference leave days.

CME entitlement is recognised during periods of approved paid leave such as annual, sabbatical or long service leave. However, it is not recognised in periods of paid leave where an employee would be considered unable to work, such as sick or carer's leave or during unpaid parental leave (except where the SMS is using their "keeping in touch days" (see clause 54.19 of the Enterprise Agreement) and this has been agreed with the CMO. CME leave entitlement is not paid during period of unpaid leave such as leave without pay (LWOP).

CME leave will wholly replace any previous entitlement to conference leave or study/exam leave (other than sabbatical leave) provided.

Applying for CME Leave

Applications for CME leave must be made at least four (4) weeks in advance on the standard leave application form.

Leave forms should be submitted to the Unit Head/Director who will then inform/discuss the leave with the Program Director to ensure that leave cover is available.

Travel days and Recovery days

Travel days

The actual number of days spent travelling from the doctor's home to the conference location and return may be added as part of the calculation of CME (work) related proportion of the travel (*refer Fringe Benefits tax and the principal purpose of travel on page 21)*. If a doctor chooses to break the journey with a stopover during either leg of travel, where direct flight options are available, the time spent at the stopover location will be considered private travel time within the work vs personal travel time calculation.

Recovery days

Time zone adjustment periods of up to 1 day (in total) for local conferences and 2 days (in total) for overseas conferences may be added as part of the calculation of CME (work) related portion of the travel time (*refer Fringe Benefits tax and the principal purpose of travel on page 21*).

CME Eligibility

Full time and Fractional SMS

CME is available to full-time and fractional SMS who have an appointment with Monash Health.

Internal Locum

Internal locums are entitled to claim a CME entitlement which is pro rata based on hours worked. This will be calculated quarterly in arrears (January, April, July & October) and entitlements & balances updated in the electronic claim system. Any accrued entitlement must be claimed within the subsequent 3-month cycle.

CME entitlement and/or reimbursement is **not** recognised or paid:

- ✘ After cessation of paid employment with Monash Health, for example, after termination of service/resignation from service/completion of a fixed period of service, redundancy; or,
- ✘ Fee for Service, Honorary Specialists and external locums engaged via locum agencies.
- ✘ During any period of unpaid leave, for example unpaid personal leave or leave without pay (LWOP).
    - The only exception to this is the recognition of a CME entitlement during the unpaid elements of Maternity/Parental Leave, where CME expenditure will be reimbursed.

Calculation of CME Entitlement

The CME entitlement is calculated up to a maximum benefit value of as per table below per financial year, inclusive of GST and FBT.

Continuing Medical Education Support Reimbursement Caps (Annual Amounts*)

2022-23	2023-24	2024-25	2025-26
$29,000.16	$29,725.16	$30,468.29	$30,468.29**

**Pro rata for Fractional Doctors (1/35th per contracted hour)*

***Will be updated in line with pending 2026-2030 SMS EA negotiations*

CME is calculated and paid pro-rata, according to the hours of employment with 35 hours being the denominator for fractional / full time employees and 38 hours being the denominator for internal locum employees.

Where an SMS holds more than one fractional appointment with different employers, the total benefit from all employers in Victoria available to the SMS each year will not exceed the maximum full-time allowance per annum.

CME is available in its entirety in the financial year of employment no matter what date of commencement.

Changes in Hours

Changes to employed hours will alter the CME entitlement amount. For SMS employees who have a change to contracted hours, the CME entitlement amount will change from that point in time.

There will be no CME entitlement paid out upon resignation, redundancy, retirement or cessation of employment.

There is no transfer of unutilised entitlements to fund support between Health Services.

Carry over

Except in the case of special carry-over, no residual CME entitlements, nor CME expenses, can be carried back into the previous, or forward into the next financial year.
(Refer to Conference Expenses for split claims over multiple financial years)

Special Carry over provision

Special carry-over allows the SMS employee with the provision of reasonable evidence, to carry-over the unused component of their CME entitlement in particular circumstances. This can occur when an SMS is prevented from utilising the CME entitlement in a particular financial year due to:

- Parental leave in accordance with the Enterprise Agreement
- Primary family/carer responsibilities
- Personal illness or injury
- Other exceptional circumstances approved by the CMO of Monash Health

In accordance with Clause 41.5 of the Enterprise Agreement, special Carry over requests are to be submitted by 30th June to CME team for consideration via Monashdoctors_CME@monashhealth.org
The total amount of CME entitlement that an SMS may accumulate in any one financial year is capped at an amount equivalent to two years' CME funding support.

Reimbursable Expenses

Conference Expenses

- ✓ Costs relating to professional conferences, courses, and workshops.
- ✓ Costs associated with registration/enrolment in relevant short courses, workshops or post graduate courses recognised by the Specialty College for purposes of accruing CME/CPD/MOPS points.
- ✓ Costs associated with registration/enrolment in climate and sustainability related health topics.
- ✓ Conference materials

Conference cancellation or failure to attend an education event after payment of CME reimbursement has been made will require the SMS to reimburse the cost back to Monash Health.

When any conference expenses are claimed in advance of attendance, a declaration to the above will be requested on submission of the claim in the electronic claim system.

Please refer to the **Fringe Benefits Tax and the principal purpose of travel** section in relation to pro rata personal travel & conference claims.

Conference claims over multiple financial years (split claims):

When planning to attend a conference in the following financial year, but have limited or exhausted your CME funds in the current financial year, you may book and submit a claim up your remaining balance for airfares, accommodation and/or registration costs. The unclaimed balance of the expenses will be accepted under the next Financial year in which the event is occurring.
Please note – this is exceptional for conference and university course related expenses only.

Travel Expenses

Travel expenses associated with the direct travel to and from the approved education activity may be reimbursed as CME. Additional travel for personal purposes must not be claimed.

Taxi/ride share costs from the doctor's home to the airport and return, as well as from the destination airport to the conference accommodation and return are claimable. All other transport expenses whilst at the conference location are not claimable as they are covered by the per diem.

Air Travel

Air travel associated with approved CME activities will be reimbursed at the rate of economy class for journeys of less than 3 hours duration and business class for journeys of 3 hours or more.

Airfares to and from professional conferences / workshops should be as direct as practicable and must not include additional or lateral movements for personal purposes. The exception to this rule is where the purchase of a packaged fare is cheaper than a direct fare.

Trading of higher priced fare for two lower cost fares is not permitted.

Copies of boarding passes and full flight itinerary should accompany all claims.

An SMS employee is responsible for their excess baggage charges (unless specifically carried on behalf of Monash Health).

Claims related to air travel for conference should have evidence of conference registration attached whilst submitting a claim in the electronic claim system.

Frequent Flyer Schemes & Incentives

At present, Monash Health allows personal benefit from credit card incentive or frequent flyer schemes and similar, which offer benefit based on accumulation of points according to money spent or distance flown.

Travel Insurance

Where travel insurance is taken for the purpose of the CME travel (i.e. cancellation of flights) 100% of the cost can be claimed as CME expense.

Where private travel days exceed the conference leave and travel days, then travel insurance costs will be reimbursed at 50%.

Where an annual insurance policy is taken, it will be assumed that 50% of the cost of the insurance is CME related, unless additional evidence is supplied.
Claims related to air travel insurance for conference should have evidence of conference registration attached whilst submitting a claim in the electronic claim system.

Private Car Use

Private car use associated with CME activities may be claimed at the relevant rate per business kilometre published by the Australian Taxation Office from time to time – Refer to: http://www.ato.gov.au.

The maximum rate reimbursed shall not exceed that which would have been reimbursed if the SMS had taken a domestic flight, this includes any per diem expenses. An exception would be made if a flight, bus or train travel was impossible. The primary purpose of the travel will be considered when calculating the amount to be reimbursed.

Car Hire

Car hire would not be expected to be claimed as a CME-related activity unless no other transport option (flights, public transport, taxis) is available. The vehicle hired must be reasonable for the CME activity. Car-hire may not be claimed for:

- ✘ travelling interstate or inter-country, except in emergencies (i.e. cancellation of other forms of travel due to strikes or equipment failures); and
- ✘ when the SMS is accompanied by family/friends on the travel.

Monash Health does not accept responsibility or liability for loss associated with, or damage to a hire car being used during a CME conference and considers appropriate insurance as obligatory and is reimbursable as part of approved CME claim.

Parking and Local Travel Costs

Conference and attendant parking fees are reimbursable. Local attendees (i.e. those attending a conference in their home city) can claim parking or travel costs including public transport fares. They cannot claim accommodation, meals or per diem rates.

Accommodation

Approved accommodation may be at the hosting conference hotel or hotels recommended by the organisers which are in close proximity to the event.

Generally, the cost of local accommodation is approved up to the level of ATO reasonable allowance rates within Australia and up to a maximum rate based on the ATO cost group for domestic accommodation: Tax Determination 2025-2026

Reasonable expenses are allowed to claim for international accommodation. It is strongly advised to choose hotels recommended by conference host.
Claims related to accommodation for conference should have evidence of conference registration attached whilst submitting a claim in the electronic claim system.

Please note CME is an individual's employee's entitlement and as such costs incurred for family accommodation (family rooms, guest suites etc.) will be reimbursed at reasonable, maximum single rate of the conference tariff.

Incidental room charges such as in house movies or services, minibar, and refreshments outside of meals are not claimable.

Accommodation is not payable for attending a conference/workshop in the SMS home city.

Meals and Incidental expenses

Reimbursement of reasonable and necessarily incurred meal and incidental expenses will be approved to a maximum amount in accordance with the amounts set out in the relevant ATO Tax Determination *(Tax Determination TD 2025/04)*. The rate used will be based on the base full-time equivalent salary applicable to the position occupied by the SMS.

Per Diem expenses can be claimed for all days attending a full day conference or educational event but they cannot be claimed when the majority of that day is spent in an aircraft or in some other activity not related to CME. Where a per diem is claimed, no additional food or incidental costs (including taxi fares) can be claimed for the travel.

Full per diem rates are applicable only when meals are not already supplied as part of an expense also claimed as CME at any Victorian Health Service, such as lunch on conferences or breakfast in hotel rates. The SMS will adjust his/her claim as applicable.

Per Diem expenses for attendees of conferences that are held in rural Victoria (i.e. outside metropolitan Melbourne) may be able to claim expenses or per diems, if the distance means that overnight accommodation is required rather than traveling each day to a multiday conference.

Please note that an evening social event is not a justification for a claim for overnight accommodation.

Meals and incidentals are generally not payable for attending a conference/workshop in the Doctor's home city.

Per Diem in advance

Per diem claims cannot be made in advance of the CME activity/expense occurring. Please include Conference registration and travel itinerary during submission of claim for Per Diem.

Portable Technological Aids

Laptop / Notebook expenses

Laptop/notebook purchases may be reimbursed where the SMS can demonstrate that it is a reasonable and necessary expense for their CME purposes, and a similar item has not been reimbursed as CME support from any Victorian Health Service within the last 2 years.

- ✓ One laptop/notebook computer may be reimbursed within its anticipated depreciable life (i.e. every 2 years (24 months). The maximum routinely claimable amount for a laptop **including initial accessories purchased** is $6,000 (inclusive of GST). NB. Proposed expenditure greater than $6000 requires preapproval by a Program Director.
- ✓ Reasonable costs for protective cases for the portable devices are also claimable.
- ✓ External hard drive/extra memory storage can be claimed.
    - Item reimbursed must be within capped amount of $6,000 (incl. GST)..
- ✓ Basic Microsoft Office software Packaging (i.e. 'Home and Student or equivalent) is claimable
- ✓ Extended Warranty on Laptop device can be claimed if written justification is provided.
- ✓ Reasonable cost of repairs on a laptop or tablet may be approved by the CMO on a case-to-case **basis.**

Portable Accessories

The definition of a portable technological aid is an item designed to be used without the need or requirement of a power source (i.e. can function without power). Claimable items in this category include:

- ✓ **Wireless headphones / earbuds (1 pair per year)**
- ✓ **Wireless keyboard & mouse**
- ✓ **Wireless printer / scanner**
- ✓ **Stylus pens**

Smartphones / Tablets and Camera Expenses

Smartphone / iPad / Tablet purchases may be reimbursed where the SMS can demonstrate that it is a reasonable and necessary expense for their CME purposes, and a similar item has not been reimbursed as CME support from any Victorian Health Service within the last 2 years.

- ✓ One **smartphone** device within its anticipated depreciable life i.e. every 2 years (24 months). Maximum claim amount for a smartphone is $3000 incl GST and accessories purchased.
    - Extended warranty and reasonable costs for protective cases are claimable.
- ✓ One **Tablet** within its anticipated depreciable life i.e. every 2 years (24 months). Maximum claim amount for a tablet is $3000 incl GST and accessories purchased.
    - Extended warranty and reasonable costs for protective cases are claimable.
- ✓ **Cameras** will be approved on a case-by-case basis (pre-approval by Program Director must be sought), according to the professional need of the applicant.
    - The maximum claimable amount for a camera is $2,000 (inclusive of GST).
- ✓ Reasonable costs for **protective cases** for portable electronic devices are claimable.
- ✓ Tablets claims may include Microsoft Surface Pro and/or any other device, however, are only claimable where a keyboard needs to be purchased as a separate attachment. Where a keyboard is built into the item, this is considered a 'laptop' claim.

- ✓ Broken smart phone can be claimed within 2 years lifespan if its irreparable. Please provide justification from your service provider that the phone cannot be repaired and attach it to the claim.
- ✓ Reasonable cost of repairs on a smartphone may be approved by the CMO on a case to case.

Non-Portable Information Technology Devices

Non portable technological aids are defined as items which require a power source to function. Claimable items in this category include:

- ✓ Desktop PC
- ✓ Monitor
- ✓ Wired keyboard and mouse
- ✓ Wired printer / scanner
- ✓ Speakers
- ✓ Powered external hard drives

Please note: Non-Portable IT Devices will attract additional FBT using the ATO's calculations (47% of the grossed up (2.0802 X) item value). The FBT amount will be deducted from your CME balance as a separate and additional adjustment.

Non-Portable IT Devices have a total sublimit of $5,000 per financial year (full time) and are pro rata on fractional contracted hours. This sublimit includes the items' costs PLUS the FBT.

Example – You are contracted for 17.5hrs per week (0.5FTE). Your annual claim limit for non-portable IT devices is $2500 (inclusive of FBT) of which you can spend $1264.10 on the devices. An additional amount of $1235.90 will be deducted from your yearly cap, as the FBT Component, if you claim to the cap.

A Doctor may seek reimbursement above these values in exceptional cases where it can be established the claim is reasonable and necessary. Pre-approval must be sought from the Program Director prior to purchase. This request must be made in writing providing justification for the need to exceed the reasonable threshold.

Refer below table that sets out the value of 'information technology devices or accessories that can be reimbursed having regard to the EFT of the Doctor and it's FBT status.

FTE	Cap on "Information Technology Items" (inclusive of FBT)	Total amount the Specialist can spend and be reimbursed on "Information Technology" items	FBT Component which will reduce your CME balance
0.1	$500.00	$252.82	$247.18
0.2	$1,000.00	$505.64	$494.36
0.3	$1,500.00	$758.46	$741.54
0.4	$2,000.00	$1,011.28	$988.72
0.5	$2,500.00	$1,264.10	$1,235.90
0.6	$3,000.00	$1,516.92	$1,483.08
0.7	$3,500.00	$1,769.74	$1,730.26
0.8	$4,000.00	$2,022.56	$1,977.44
0.9	$4,500.00	$2,275.38	$2,224.62
1	$5,000.00	$2,528.20	$2,471.80

CME Category – Information
Devices and Accessories

Item	Reimbursable	Comparable Item	CME Threshold	FBT Status	$1 of CME Threshold used per $1 claimed	Points to Note
Computer Accessories (e.g. Keyboard, Mouse, speakers, microphone, web camera, privacy screens)	Yes	N/A	$200 (per item)	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	N/A
Computer Monitors	Yes	N/A	$1,500	Yes - for Items > $300	$1.98	If $300 or less, ensure completed FBT Declaration noting that the item is used mainly for work related purposes
Desktop Computers	Yes	N/A	$5,000 (inclusive of GST and FBT)	Yes	$1.98	Maximum claimable amount of $5,000 p/a (pro-rata) including FBT
Docking Stations	Yes	N/A	$500	Yes - for Items > $300	$1.98	If $300 or less, no FBT if ensure completed FBT Declaration noting that the item is used

						mainly for work related purposes
Network Attached Storage (NAS) Devices	Yes	N/A	$300	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	N/A
Printer, Scanner, Multifunction Printers – **not portable**	Yes	N/A	$1,000	Yes - for Items over $300	$1.98	If $300 or less, no FBT if ensure completed FBT Declaration noting that the item is used mainly for work related purposes
Printer, Scanner, Multifunction Printers – **portable**	Yes	N/A	$1,000	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	
Printer Toner / Cartridges	Yes	N/A	Recommended Retail	No – ensuring completed FBT Declaration that the item is used	$1	Maximum three (3) per annum

				mainly for work related purposes		
Wi-Fi Routers / Boosters	No	N/A	N/A	N/A	N/A	N/A

CME Category – Portable Technological Aids

Item	Reimbursable	Comparable Item	CME Threshold	FBT Status	$1 of CME Threshold used per $1 claimed	Points to Note
Smart Phone	Yes	All types of Smart Phones	$3,000	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 every 2 years
Tablet / Smart Device (e.g. iPad / Surface pro / Tab) (Reasonable accessories i.e Keyboard & mouse are claimable as part of the package)	Yes	All types of Tablets & Smart Devices	$3,000	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 every 2 years
Tablet Keyboard Cover (eg Apple Magic Keyboard for iPad)	Yes	N/A	$579	No – ensuring completed FBT Declaration that the item is	$1	1 every 2 years

				used mainly for work related purposes		
Digital Camera	Yes	N/A	$2,000	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes.	$1	Approval on a case-by-case basis & 1 every 3 years
Laptop / Notebook (Reasonable accessories i.e Keyboard & mouse are claimable as part of the package)	Yes	Other types of Laptop / Notebooks	$6,000	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 every 2 years
Laptop / Notebook Accessories	Yes	NA	Refer Laptop	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 every 2 years
Extended Warranty	Yes	N/A	Recommended Retail	No – ensuring completed FBT Declaration that the item is	$1	Excludes support subscriptions. Note: may impact on replacement period

				used mainly for work related purposes		
Headphones / Earphones	Yes	All differing types of Headphones / Earphones	$500	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 pair per year
Portable Scanner	Yes	N/A	$300	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	1 per year
Portable Storage Devices	Yes	Network Attached Storage (NAS) Devices	$300	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	N/A
Protective Cases	Yes	N/A	$150	No – ensuring completed FBT Declaration that the item is	$1	N/A

				used mainly for work related purposes		
Smart Watch	No	N/A	N/A	N/A	N/A	N/A

CME Category – Software

Item	Reimbursable	Comparable Item	CME Threshold	FBT Status	$1 of CME Threshold used per $1 claimed	Points to Note
Microsoft Office	Yes	Similar Office Suites	Recommended Retail	No – ensuring completed FBT Declaration that the item is used mainly for work related purposes	$1	Includes Microsoft Office Annual subscriptions. Limited to Standard/Basic packages only.
Adobe Acrobat (or similar)	No	N/A	N/A	N/A	N/A	N/A
Dictation Software	No	N/A	N/A	N/A	N/A	N/A
Meeting Subscription Services (e.g. Zoom)	No	N/A	N/A	N/A	N/A	N/A
Storage Subscription Services (e.g. Dropbox)	No	N/A	N/A	N/A	N/A	N/A
Survey Monkey (or similar)	No	N/A	N/A	N/A	N/A	N/A
Video / Photo Editing Software	No	N/A	N/A	N/A	N/A	N/A

The following devices are not claimable for reimbursement from CME support:

- ✘ Smart Watches or iPods / Audio devices
- ✘ Photocopying expenses and peripherals including printer cartridges paper, stationary etc
- ✘ Office Furniture

The anticipated life cycle of an electrical device is two (2) years and whilst it would be unusual that a practitioner requires a new device for CME purposes the reimbursement will be considered on a case by case basis and it be demonstrated that the device is non-functional or no longer fit for CME purposes.

Reasonable software required for the CME activities of the computer purchase (eg. basic word processing, basic adobe etc software, operating systems, cloud storage and security/antivirus) are reimbursable.

Electronic medical textbooks and databases are acceptable if not already provided by Monash Health.

Extended Warranties and protection devices are claimable under CME Support, again where reasonable and necessary. Where an extended warranty has been claimed, a new technological device of a similar nature will not be eligible for CME Support reimbursement until the extended warranty has expired unless loss of or damage to that item falls outside the purchased warranty.

Other CME related expenses

Other reimbursable expenses include:

- ✓ Other reasonable costs such as **books, educational specialty CDs** and **subscriptions** where such resources are not otherwise provided by, or available from, Monash Health.
- ✓ **Registration costs** of relevant **Specialist Medical College** or **Association** in the medical field in which the Doctor is credentialed and practicing.
- ✓ In addition to the Specialist College registration costs, the **journal component of a membership**, if itemised on the invoice, will be reimbursed. Where the journal subscription alone exceeds the cost of the combined membership and the journal subscription, then the full membership will be reimbursed.
- ✓ **Child care expenses** will be paid where the SMS can establish that they are the Primary Carer (as defined in the Enterprise agreement) during the CME activity period. The rate will be a fixed at $250 per day to cover the costs of child care during this period. The SMS needs to provide reasonable evidence such as a Statutory Declaration that they are the Primary Carer, but evidence of costs incurred is not required. Childcare expense receipts do not need to be provided with the claim.
- ✓ Expenses whilst on **sabbatical leave** may be claimed including airfares, accommodation and per diem.

- ✓ Electronic **medical textbooks and databases** are acceptable. Please note Up To Date is a subscription provided by Monash Health to employees and therefore claims for this item are not reimbursable.

Journal Article Publishing Expenses

Claims for journal article publication submission costs will only be approved if they are directly relevant to your employment at Monash Health. All claims must be pre-approved by your Unit Director and Program Director.

Hit the Ground Running Course

Overseas Trained Specialist can claim the course fees for Hit the Ground Running that is accredited by PMCV . The claim has to be submitted after commencement in the role.

Expenses not considered CME

- ✘ Altruistic/third party purposes – expenses must be for the SMS personal continuing medical education
- ✘ Items of a capital nature (e.g. ultrasound imaging devices, medical equipment)
- ✘ Expenses for subscriptions to OpenAI and similar generative AI services.
- ✘ Relevant internet subscriptions which are already provided by Monash Health
- ✘ Global positioning systems
- ✘ Professional indemnity
- ✘ Any costs associated with an accompanying person
- ✘ Clothing or footwear
- ✘ Membership of other bodies including special interest groups, the AMA, Unions, Sporting clubs etc.
- ✘ AHPRA Medical Registration fees
- ✘ Photocopies and peripherals including cartridges
- ✘ Telephone calls
- ✘ Televisions, DVD or Blu-Ray recorders
- ✘ Traffic offences and other fines
- ✘ Stethoscope (these are considered tools of trade)
- ✘ Lumio lens
- ✘ Apple Watch and/or similar device
- ✘ Costs associated with childcare are not considered reimbursable unless the person attending the CME activity is the Primary Carer. (see above)
- ✘ Laundry or dry cleaning

- ✘ Luggage, briefcases or cases other than that for a new laptop or portable device
- ✘ While all conferences and attendant parking fees are reimbursable, local attendees (i.e. those attending a conference in their home city) cannot claim accommodation, meals or per diem rates

Claim timeframes

Claims are to be submitted within the financial year in which the expense is incurred, or otherwise within 3 months of the end of the financial year to which they relate.

No claims applicable to the previous financial year will be accepted after **30 September**.

All claims must be submitted via the electronic CME claim system and all claims must be approved by the relevant authorised delegate.

Frequently asked questions and guides on how to submit claims can be found at www.monashdoctors.org/CME under the CME section and on the SAP Concur Knowledge Hub

Reimbursement process

Claims are to be submitted to Monash Doctors Workforce via the electronic CME claim system for approval and accompanied by original tax invoices/receipts, proof of payment (bank statements or receipts showing the name of the claimant and stating a zero balance), dates of when the conference is taking and any other necessary supporting documentation, including FBT purposes (e.g. travel diary)

It is strongly recommended SMS keep copies of all documents (including receipts, invoices etc.) submitted.

Where international transactions are claimed, a copy of the extract of the credit card transaction must be included to show the actual exchange rate.

Fringe benefits legislation requires all overseas travel and certain domestic travel be substantiated. For this reason, a travel diary must be completed for all international travel and domestic where you are away for six or more nights.

Remember! No claims applicable to the previous financial year will be accepted after **30 September**.

Claim approval delegation:

SMS -> Monash Doctors Workforce -> Program/Service Director -> Finance -> Payroll (Payment)

Assessment and payment timeframes

All claims that are accompanied by original receipts and necessary supporting documentation, including a travel diary if needed, will be reviewed by Monash Health within 30 calendar days (not including the day of receipt or Public Holidays).

If there is requirement for Monash Health to obtain further information from the SMS or the claim is rejected fully or in part, this will be communicated in writing to the SMS within the 30 calendar day period via the electronic claim system.

If the rejected claim is not returned with additional information by 30th December of that calendar year the claim will not be processed. (This will not apply for 2025FY claims due to change in claiming system effective October 2025. This will be communicated clearly prior to the closing of SAP Concur).

If Monash Health approves the claim OR does not notify the SMS of its intention to reject part or the entire claim within the 30 day period, Monash Health will pay the full amount of the claim within 45 days.

Gifts, sponsorship and conflicts of interest

Where any costs which would ordinarily be claimable through CME are to be met from sources other than Monash Health, or claimed as tax deductions; SMS cannot also claim the value through CME. Please refer to Monash Health Policy relating to Conflict of Interest.

Any gift, sponsorship or hospitality offered to SMS for the purposes of a CME-reimbursable activity or expense should be declared on the CME claim form.

Dispute Claims Resolution

Where a CME claim, item or part thereof is not approved or found to be non-compliant, the claim will be sent back to the SMS seeking clarification of the item/s in question. Decisions or requests for further information will be provided in writing to the SMS via the electronic claim system.

Once SMS has considered the decision/request by Monash Health, if they wish to respond then they must do so in writing. Monash Health will the respond in writing with a decision within 7 calendar days from receipt of SMS's written response.

If the SMS disputes the final determination of Monash Health, they may raise the dispute in accordance with the Dispute Resolution Procedure. This procedure is outlined in Clause 11 of the *Medical Specialists (Victorian Public Health Sector) (AMA Victoria/ASMOF) (Single Interest Employers) Enterprise Agreement 2022-2026*. The conduct of the Dispute must comply with the requirements of Clause 11.

To resolve the dispute the claimant will meet with the relevant Director of Medical Services within 14 days. The claimant will be invited to submit a written submission detailing why their CME claim should be approved. If the claimant wishes they are entitled to have representation at this meeting.

If the matter is still unresolved then this will be escalated to the Chief Medical Officer who will convene a review panel within the Monash Doctors Leadership Committee to meet with the claimant and/or their representative. The Review panel will comprise:

- A Monash Health Director of Medical Services not involved with the original claim
- A representative of the human resources department (so named)
- The Professor of Surgery or Medicine as appropriate to the craft group in question or if not available the Chair or their nominee of the Medical Staff Association
- By invitation of the employer or employee, a representative of the employer or employee association or organisation may attend

The committee will detail their deliberations and communicate a decision in writing to the claimant.

If the dispute cannot be resolved, then it may be referred to the Fair Work Commission for conciliation or arbitration.

Payment Summary (Group Certificate)

As substantiated CME expenses are a reimbursement, these are not part of your regular pay for taxation purposes and so payment amounts will not appear on your annual Payment Summary / group certificate.

Salary Packaging, GST or VAT

Any claims that have been reimbursed through this CME process cannot be claimed again through salary packaging, tax deductions, from another health service, or any other means, as that may be considered fraud. Claims that are found to be fraudulent or deliberately falsified will be construed as gross and wilful misconduct and will result in disciplinary action. This action may include dismissal and/or legal proceedings.

Where a Value Added Tax (VAT) or Goods & Services Taxes (GST) refund is received, reimbursement on claimed CME expenses should disclose any refunds received by reducing their claim to reflect such refunds.

Fringe Benefits Tax and the principal purpose of travel

As an Employer, Monash Health is liable for Fringe Benefits Tax on any non-work-related entitlement it supplies, in either case or in kind, to its employees. This tax is paid at a standard rate of 47% on the grossed up value of any component of CME related travel, accommodation or expenses which would not normally be considered work related and therefore, tax deductible.

Where a CME activity is undertaken in conjunction with annual leave, travel costs pro-rated accordingly may be reimbursed. The key determinant is the primary purpose of the trip.

Where the time spent at the conference or seminar, including travel/transit and recovery days, is **greater** than the time spent on private travel 100% reimbursement for approved travel expenses may be paid.

Where private travel time **exceeds** the conference/seminar component including travel/transit and recovery time (i.e. >50% of the total time away), then the travel expenses will be reimbursed on a pro-rata basis. The rate is based on the percentage of total time travelling for CME purposes vs personal travel time.

Private Travel proportion of trip	Primary purpose determination	Reimbursement rate
Personal travel days ≤50% of total time away	Primary purpose of the trip is conference/business-related	Full reimbursement (100%) of travel expenses
Personal travel days >50% of total time away	Primary purpose of the trip is personal/leave-related	Pro-rated travel expenses

Calculation of pro rata airfares is based on departure date and arrival date on your boarding pass / invoice. Conference dates plus recovery & travel days are subtracted from the total time away and if conference days are less than 50% of the trip, airfares will be reimbursed on a pro rata basis.

For example. Entire trip is 17 days in length. Overseas conference is 4 days + 2 days total recovery + 2 days total travel time = 8 days. As personal travel is ≥ 50% of the total trip (17 – 8 = 9 days personal time), reimbursement would be 47% of the airfare.

Please refer to the CME Airfare Reimbursement Calculator (Business vs Private Travel Days) on the Monash Doctors CME page to calculate airfare reimbursement amounts.

Where annual/personal leave is taken in conjunction with CME related travel, costs such as travel insurance will also be reimbursed on a pro-rata basis.

Where an annual insurance policy is taken, it will be assumed that 50% of the cost of the insurance is CME related, unless additional evidence is supplied. Any additional costs incurred as a result of annual leave, i.e. additional travel will not be reimbursed.

CME Claim Duplication & Fraud

CME claims which have been reimbursed through the CME process cannot be claimed again through salary packaging, income tax deductions, from another health service, or any other means; to do so may be considered fraud.
Claims that are found to be fraudulent or deliberately falsified will be construed as gross and wilful misconduct and will result in disciplinary action. This action may include dismissal and/or legal proceedings

CME Audit Process

Monash Health reserve the right to audit any and/or all CME claims. Specific note is made with regard to "per diem" claims and requirements for substantiation in that the claim should not exceed the amount actually incurred for work related purposes.

RELATED DOCUMENTATION

- AMA Victoria – Victorian Public Health Sector – Medical Specialist Enterprise Agreement
- Taxation Determination. Income tax: what are the reasonable travel and overtime meal allowance expense amounts for the 2022-23 income year?

KEYWORDS

Continuous Medical Education, CME

Document Governance	
Supporting Policy	Medical Specialist Enterprise Agreement 2022-2026
Executive Sponsor	Chief Medical Officer / Executive Director Medical Services
Program, Service, Unit, Department or Committee Responsible	Monash Doctors Workforce
Document Author	Senior Coordinator SMS Recruitment & Credentialing