

**DAVID LAWRENCE CENTERS
OPERATIONAL PROCEDURE**

SUBJECT: Licensure, Certification, Conference and Membership Reimbursement	CATALOG NUMBER: ADM-178
AREA: Human Resources / Staff Development	APPLIES TO: All Staff
PURPOSE: To assure all staff members are apprised of the procedure to follow for reimbursement of costs related to tuition, licensure, certification, conferences/ workshops and professional memberships.	

PROCEDURE:

1 LICENSURE/CERTIFICATION REIMBURSEMENT

- 1.1 DLC will provide financial support for the following expenses incurred in preparation for and/or attaining licensure:
 - 1.1.1 100% of the application fee
 - 1.1.2 100% of the test fee
 - 1.1.3 Mileage to and from the test center (maximum of 250 miles)
 - 1.1.4 Administrative leave for test day
- 1.2 Before a supervisor approves a licensure reimbursement application, the following criteria must be met.
 - 1.2.1 Has completed the initial employment period prior to reimbursement request
 - 1.2.2 Has received met expectations on the last two Competency Evaluations.
 - 1.2.3 Is in good standing (no counseling statements within the previous 3 months and current on all mandatory training and immunization requirements).
 - 1.2.4 Licensure/Certification of this employee has a direct benefit to DLC.
- 1.3 The request for Licensure reimbursement must be submitted with a completed **Request for Licensure / Certification / Membership Reimbursement (ADM-178A)**. The form is available on the home page in e3. All requests are subject to approval by the following staff members in the order in which they appear:
 - 1.3.1 Direct Supervisor
 - 1.3.2 Service Director
 - 1.3.3 Human Resources Director
 - 1.3.4 Chief Operating Officer

After all approval signatures are attained, the form will be forwarded to accounting for proper monetary disbursement.

With the exception of the application fee, 80% of expenses submitted will be paid in advance. The remaining 20% of expenses will be disbursed upon Human Resources receipt of a voucher for Reimbursement of travel expenses, due within 5 business days of test. Official notice of passing the exam must also be presented to Human Resources within a reasonable period of time.

- 1.4 Employees will be expected to sign a work committal with DLC, for 1 year from the date of each licensure test. An employee who does not receive a passing grade on an exam and who does not file an application to re-take the exam will immediately reimburse all monies to DLC, which were paid in advance. DLC will not provide additional financial support of a re-test with the exception of an administrative leave day. The total cost for the process of licensing and/or certification will be reimbursable for 6 months from the date the expense was incurred.
- 1.5 The original request for licensure reimbursement will be placed in the employee's personnel file. A copy will be retained by Accounts Receivable.
- 1.6 Upon resignation / termination, the personnel file will be reviewed for reimbursement forms. Any reimbursement received for examinations taken within the last year will be deducted from the employee's final paycheck or if total monies owed DLC exceeds the estimated net salary, it will be deducted with an agreement of negotiation between the Human Resources Department and staff member. Contract period of one year may be extended for employees who experience paid or unpaid leave equal to the amount of leave time taken.

2 LICENSURE/CERTIFICATION RENEWAL REIMBURSEMENT

- 2.1 DLC will provide financial support for the following expenses incurred in renewing licensure/certification:
 - 2.1.1 100% of the renewal fee
- 2.2 Before a supervisor approves a licensure reimbursement application, the following criteria must be met.
 - 2.2.1 Has completed the initial employment period prior to reimbursement request
 - 2.2.2 Has received met expectations on the last two Competency Evaluations.
 - 2.2.3 Is in good standing (no counseling statements within previous 3 months and current on all mandatory training and immunization requirements).
 - 2.2.4 Licensure/Certification of this employee has a direct benefit to DLC.
- 2.3 The request for Licensure reimbursement must be submitted with a completed **Request for Licensure / Certification / Membership Reimbursement (ADM-175C)**. The form is available on the home page in e3. All requests are subject to approval by the following staff members in

the order in which they appear:

- 2.3.1 Direct Supervisor
- 2.3.2 Service Director
- 2.3.3 Human Resources Director
- 2.3.4 Chief Operating Officer

2.4 After all approval signatures are attained, the form will be forwarded to accounting for proper monetary disbursement.

2.5 The original request for licensure/certification reimbursement will be placed in the employee's personnel file. A copy will be retained by Accounts Receivable.

2.5.1 Upon resignation / termination, the personnel file will be reviewed for reimbursement forms. Any reimbursement received for licensure renewal taken within the last year will be deducted from the employee's final paycheck or if total monies owed DLC exceeds the estimated net salary, it will be deducted with an agreement of negotiation between the Human Resources Department and staff member. Contract period of one year may be extended for employees who experience paid or unpaid leave equal to the amount of leave time taken.

3 **PROFESSIONAL MEMBERSHIP & CONFERENCE REIMBURSEMENT**

3.1 Employees may request reimbursement for attendance of a professional conference/ workshop and membership in professional organizations¹. A supervisor's approval for reimbursement must meet the following criteria:

- 3.1.1 Membership or conference/workshop benefits the employee's professional growth.
- 3.1.2 Periodicals, newsletters and other educational information will benefit other David Lawrence staff.
- 3.1.3 Employee must meet the performance requirements stated under Licensure Reimbursement.

3.2 Requests for Professional Membership reimbursement must be submitted with a completed **Request for Licensure / Certification / Membership Reimbursement (ADM-178A)** which follows the same approval as stated under Licensure / Certification listed above in Section 2.2. Reimbursement for membership is paid at 100% at the time of approval. Reimbursement is limited to membership in one (1) Professional Organization. If travel is required for the Professional Membership request, a Request to Incur Staff Development and/or Travel Expenses (ADM-622A) must be completed by staff member. Reimbursement for professional conferences /workshops follows the same distribution as for licensure /certification. Additional expenses, such as hotels, mileage and meals for conferences are discretionary and based upon the approval of the Service Director. Within 5

business days, the Travel **Reimbursement for Out of Town Travel (FRMADM-622B)** and a **Certificate of Attendance** must be presented to the Human Resources Department. Human Resources will forward forms to Accounts Payable for final processing.

- 3.3 Employees will be expected to sign a 1-year work committal from the date of application approval if the reimbursement meets or exceeds \$100.00. Upon resignation / termination the personnel file will be reviewed for reimbursement forms. Any reimbursements received for memberships or conference/workshops within the past year will be deducted from the employee's final paycheck. If the amount exceeds the amount of the employee's final paycheck, they will be required to make payment arrangements with Human Resources. Contract period of one year may be extended for employees who experience paid or unpaid leave equal to the amount of leave time taken.
- 3.4 Failure of an employee to attend a scheduled conference may result in the employee's obligation to repay all non-refundable fees.

Associated Forms:

[FRMADM-178A Request for Licensure / Certification / Professional Membership Reimbursement](#)
[FRMADM-622A Request to Incur Staff Development and/or Travel Expenses](#)
[FRMADM-622B Travel Reimbursement for Out of Town Travel](#)

Signatures on file

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¹Reimbursement for professional memberships and conferences is not an employee benefit, but rather a discretionary assistance provided by DLC and subject to availability of funds. Supervisors will consider reimbursement on a case-by-case basis using the above criteria.