The purpose of this policy is to define available funding to residents and programs, including how the funding can be used and reimbursed. There are three different types of funding available; they are Program, Research Presentation, and Graduate Medical Education.

All funding is issued concurrent with the fiscal year (July 1 – June 30) and must be spent on items purchased during that year. All expenses must comply with established University guidelines and regulations, which are applicable for all UMKC School of Medicine faculty and staff, including tax exemption (when applicable).

Definitions
Resident – Resident or fellow
Qualifying Resident – Resident or Fellow supported by affiliates and paid through the University. Does not include residents paid by grants or directly by other institutions.
Reimbursement – Purchased by individual (Resident/Program Director/Program Coordinator) and submitted through appropriate process (see payment guidelines) for compensation.
Direct Payment – Purchased by University on behalf of Resident or Program paying vendor directly.
Taxable Benefit – Reimbursed funds that require taxes to be paid on purchase. Taxes required for reimbursement will be withheld from that paycheck and a separate deposit will be made to the Resident’s account. Reimbursement may be held until the next open pay day (this is not always the same month as pay periods close mid-month).

GME FUNDS
General funding is allocated for the following items that are needed during the residency training program. Use of these funds must be done through direct payment unless otherwise stated.

Resident Education Expenses:
• Missouri temporary license.
• KS Training Permit when resident has a required rotation in the State of Kansas.
• Permanent license for Missouri and/or Kansas when resident has a required rotation in State of Kansas and does not meet requirements for KS Training Permit.
• Drug Enforcement Agency (DEA) registration when required rotation is at a location that does not offer use of an Institutional DEA license.
• United States Medical Licensing Examination Step 3 or Comprehensive Osteopathic Medical Licensing Examination (COMLEX) Step 3 reimbursement if applied and registered for during first post-graduate year (PGY-1). Oral and Maxillofacial Surgery plus MD residents will be reimbursed during second post-medical school year (PGY-3). *
• Certifications purchased from an affiliate location or the University. If purchased from an outside source, the resident would be reimbursed up to the maximum amount indicated below.
  ○ BLS renewals for residents after contract year 1: $60 max
  ○ ACLS renewals for all residents after contract year 1: $175 max
  ○ ATLS for Emergency Medicine, Surgery, and Oral & Maxillofacial Surgery residents: $925 max
  ○ ATLS renewals for Emergency Medicine, Surgery, and Oral & Maxillofacial Surgery residents: $725 max
  ○ PALS for Emergency Medicine, Oral and Maxillofacial Surgery and PGY2 Community Family Medicine residents: $350 max
  ○ PALS renewals for Emergency Medicine, Oral and Maxillofacial Surgery and PGY2 Community Family Medicine residents: $200 max
  ○ NRP for Emergency Medicine, Ob/GYN, and Maternal Fetal Medicine: $275 max
  ○ NRP renewals for Emergency Medicine, Ob/GYN, and Maternal Fetal Medicine: $175 max
• Two monogramed lab coats for residents and fellows entering a fellowship or residency program.
• Bureau of Narcotics and Dangerous Drugs (BNDD) fee. For residents in their first year of the program, they will purchase their BNDD prior to starting the program and submit receipt for reimbursement after they start. For all future years, this will be purchased directly by UMKC.
• In-service and in-training exams required for residency.

*Items that are starred are considered a taxable benefit.
RESEARCH PRESENTATION FUNDS

Research Presentation funds of $500.00 are available once per academic year for residents to travel to present their research. Funds are allocated based on the date of your conference, with a limited amount of funding available each quarter.

To qualify, residents must be first or second author, and submit UMKC travel approval email, which shows PD approval and first or second author status, at least 30 days in advance to GME Finance (gmeoffice@umkc.edu). The travel approval email is received after PD approves travel request submitted through the UMKC Business Travel Pre-Approval Request portal. You will receive email notification once your request is approved.

PROGRAM FUNDS

Each program is allocated $1,000 per qualifying resident. For off-track residents, funding is pro-rated if they complete or start within the fiscal year. In addition, programs are allocated $300 per resident/fellow graduating in the current academic year to assist with graduation expenses. Funding can be used for any resident in the program. Use of program funds must be through direct payment with the following exceptions: business meals, travel, resident memberships, & educational materials purchased by residents. These items may be reimbursed or purchased through direct payment.

Program Expenses

- GME approved resident electives support. Approval of such electives must be pre-approved by the Financial Advisory Committee per Rotations at Non-Affiliated Sites Policy.
- Program membership that enhance residency program and comply with UM System BPM-215 on Organizational Dues & Memberships. Payment request must include statement on how the membership benefits the residency program. Request will go through UMKC membership approval process. If approval is not received, program will be notified.
- Special events to enhance resident education, such as guest lectures, team building, or wellness event. These funds cannot be used for alcohol. If being used for meals, reimbursement can be done if preferred by program. Items will only be paid if UM System Appearance Agreement signed and executed by authorized UMKC personnel prior to the event.

Resident Education Expenses:

- Educational materials, such as medical books, medical journals, and board review courses. Residents may purchase this equipment and be reimbursed.
- Educational equipment, such as simulators, that are used solely for resident education. Equipment that is part of the facility, such as chairs, file cabinets, conference phones, computers, and projection devices are not covered. Computers that are specific to the program and will remain UMKC property can be purchased but will go through the UMKC IT approval process.
- Certifications not covered by GME (see GME Funds section). If funds are purchased at an affiliate, UMKC must pay directly. If they are purchased from a non-affiliate, the resident must pay for and be reimburse. The amount is limited the same as if funded by GME.
- Medical items required for residency (scrubs, surgical loupes, stethoscopes, lab coats, etc.).
- Travel expenses to attending an educational meeting, course, or medical society/organization academic meeting. Hotel, registration, and airfare can be direct payment or reimbursement. All other travel related items are reimbursement. Travel must comply with the UMKC School of Medicine Travel Policy and UM System Travel Policies and approval must be received in advance through the UMKC Business Travel Pre-Approval Request portal.
- Boards that must be taken during residency* Cannot be used for boards to be taken after residency.
- Transportation Cost (taxi, Uber, etc.) to return home for residents who are too fatigued to safely return home on their own and then back to retrieve their vehicle. This will be a reimbursement to the resident.
- Professional medical society dues or fees that enhance resident education and comply with UM System BPM-215 on Organizational Dues & Memberships. This may be purchased through direct payment or reimbursement. All individual membership requests must have a benefit statement (states how the membership benefits the residency program) and PD approval. Without these items, the membership may not be reimbursed.
- Resident training, including on-line testing, resident certification not covered by GME (if outside vendor is used, this would be a reimbursement), and electronic educational resources. Cannot use for medical school related expenses for Oral Surgery residents.

*Items that are starred are considered a taxable benefit.
Resident Recruitment Expenses:
- Materials including copying, brochures, and other printed materials. Use of UMKC logo must comply with University guidelines.
- Applicant lodging and transportation
- Food/Meals (excluding alcoholic beverages and parties) in compliance with UM System Business Meal Policy. Reimbursement can be done if preferred by program
- Gifts and souvenirs expenses for applicants in compliance with UM System Awards, Gifts, & Prizes Policy.

Awards:
- Recognition through certificates and trophies (gifts are not a covered expense).
- Recognition through monetary award, which in compliance with UM System Awards, Gifts, & Prizes Policy is considered additional pay on their monthly paycheck and is taxable. Requests must be accompanied by award criteria/purpose, who/what decides the award, and what award is given. These criteria must be established within the program.

Program Coordinator/ Director Expenses
- Travel to conferences that specifically benefit the Residency Program. Program Coordinator travel has to be approved by the Program Director prior to traveling. Program Director travel would have to be preapproved by the Associate Dean of Graduate Medical Education. Hotel, registration, and airfare can be direct payment or reimbursement. All other travel related items are reimbursement.
- Society/Organization dues or fees for Program Coordinators or program faculty that enhance residency program. All individual memberships must have a benefit statement (states how the membership benefits the residency program) and supervisor approval.

Graduation Expenses
- Rental space. If contract is required, it must be processed by the University prior to the event to be paid.
- Food, not including alcohol. Reimbursement can be done if preferred by program.
- Printing of invitations.

PAYMENT GUIDELINES
Reimbursement or payment can only be processed for items purchased during the fiscal year (the University fiscal year runs July 1st through June 30th). Requests must be submitted before the year-end deadline (set each year and communicated to Program Coordinators).

Reimbursements must be turned in within 60 days of purchase or travel. If received after 60 days, it will be a taxable benefit. Due to year-end deadlines, items over 60 days will not be accepted after June 1.

University Purchase Process (Direct-Payment)
1. Invoice or Quote sent gmeoffice@umkc.edu
   a. Invoice/quote must be addressed to UMKC
   b. IT items (includes software, hardware, and online services) require CIO approval
      i. Will be requested after invoice is received
   c. Institutional Memberships require CFO approval
      i. Will be requested after invoice and benefit statement is received
2. Confirmation of payment will be sent to requester after it has been processed

Non- Travel Reimbursement Process
1. Send email requesting reimbursement to gmeoffice@umkc.edu
2. Email must include a receipt(s). Receipt must:
   a. List all items purchased
   b. Show as paid in full (payment cannot be made via gift card or financing)
   c. Be readable (PDF is preferred format)
   d. Include funding source
      i. For resident funds, requests must be sent from their UMKC email account
      ii. For program funds, program director approval must be included (can be attachment or part of email chain)
3. Confirmation of reimbursement will be sent to requester after it has been processed
Travel Reimbursement Process

1. Supervisor must approve in writing or via email prior to travel. Approval must include an estimated cost and funding source. Approval must be included on reimbursement request.
2. Send email requesting reimbursement to gmeoffice@umkc.edu. Email must:
   a. Have itemized listing of what you are requesting. Travel items may include meal per diem, mileage, airfare, registration, lodging, and incidentals.
      i. Meals reimbursed on a per diem basis. Rates are based at [http://www.defensetravel.dod.mil/site/perdiemCalc.cfm](http://www.defensetravel.dod.mil/site/perdiemCalc.cfm)
         1. For travel in the state of Missouri, the rate standard CONUS rate
         2. For all other travel, the University uses the daily meal rate for the travel location
      ii. For lodging shared by two or more residents, the resident who paid for the lodging can be reimbursed the full amount if the non-paying resident sends an email from their UMKC email address stating they are authorizing use of their funds for this purpose.
      iii. Transportation using most economical method (train, air, personal vehicle, etc.) If more expensive option is chosen, the reimbursement will be limited to less expensive option
         1. Individuals choosing personal vehicle must submit a map showing the most direct route. They will be reimbursed at the University mileage rate. The rate is set by the Controller's Office by January 1 for each calendar year and posted on the Controller's website.
   b. Receipt(s) for items over $75, lodging regardless of cost, and non-travel expenses (such as books, posters, etc.) regardless of cost. Receipts must:
      i. List all items purchased
      ii. Show as paid in full (payment cannot be made via gift card or financing)
      iii. Be readable (PDF is preferred format)
   c. Approval email received from UMKC Business Travel Pre-Approval Request portal.
   d. Include funding source
      i. For resident funds, requests must be sent from their UMKC email account
      ii. For program funds, program director approval must be included (can be attachment or part of email chain)
3. Official documentation showing conference location and dates is required for reimbursement and must be attached to email
4. Confirmation of reimbursement will be sent to requester

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