

Revised September 1, 2017

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 five different types of funding available; they are Resident, Internal Medicine Chief Resident, 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

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).

RESIDENT FUNDS

Each PGY-2 and above full-time resident is allotted \$1,000 annual education allowance for reimbursement of out-of-pocket educational expenses. These funds do not carry over and must be spent within the fiscal year. Funds for off-track residents will be prorated in the resident's first contract year and last contract year (i.e., a resident starts January 1, and they are a PGY3 they will get \$500 that academic year; a resident who ends September 30 would get \$250 for that academic year).

Allowable Education Expenses

- Medical books, medical journals, and online journal subscriptions.
- Board review courses (online and in person)
- Publication fees that result from scholarly activity during residency
- Medical items required for residency (scrubs, surgical loupes, stethoscopes, indirect ophthalmoscopes and lenses, extra lab coats (see GME funding section), etc.).
- Professional medical society dues or fees that enhance resident education and comply with [UM System BPM-215 on Organizational Dues & Memberships](#). *Must provide documentation that membership allows access to guides, examinations, training, etc. that could not be obtained without a membership.*
- Laptop, smart phone, and tablet predominantly used for residency work (limit of one device of each type per year). Warranties and other electronic items (such as printer, external hard drives, keyboard, etc) are not reimbursable. *During a residents last contract year, this must be purchased by the end of the first quarter, i.e. if a resident/fellow's contract runs from July thru June, then electronic equipment purchase must be made by the last day of September of their last academic year.*
- Travel needed for residency program. Travel must comply with the [UMKC School of Medicine Travel Policy](#) and [UM System Business Policy 500 on Travel](#). Hotel, registration, and airfare can be direct payment or reimbursement.

INTERNAL MEDICINE CHIEF RESIDENT FUNDS

Residents employed as Internal Medicine Chief Resident (per contract) are allotted \$4,500 annual education allowance for reimbursement of out-of-pocket expenses. These funds do not carry over and must be spent within the fiscal year.

Allowable Education Expenses

- All items listed in Resident Funds
- Board prep courses
- Board exams*
- Drug Enforcement Administration (DEA) Number
- Permanent licensure

**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 research. To qualify, residents must be first or second author and submit request form at least 30 days in advance complete with PD approval to GME Finance (see GME structure chart). You will receive email notification once your request is approved. Please note, research funding is limited and only available until exhausted. We will notify program coordinators once annual funding has run out.

PROGRAM FUNDS

Each program is allocated \$1,000 per resident/fellow in their program that overhead is paid on. For off-track residents, funding is pro-rated if they complete or start within the academic year. Funding can be used for any resident in the program, regardless if overhead is paid on them. Use of these funds must be done through direct payment unless otherwise stated below.

Resident Education Expenses:

- Resident education expenses for PGY-1 residents through authorizing reimbursement as needed or by transferring a certain amount to all PGY-1 residents. For PGY-2 and above residents, the program can supplement individual resident expenses once the individual resident's \$1,000 annual education allowance is spent or if they purchase for all residents.
- Educational materials such as books, simulators, electronic equipment 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.
- Resident training including on-line testing, resident certification not covered by GME (if outside vendor is used, this would be a reimbursement), and electronic applications as educational resources. *Cannot use for medical school related expenses for Oral Surgery residents.*
- Special events to enhance resident education, such as guest lectures, team building, or wellness event. Speaker fee and allowable travel expenses will only be paid if [UM System Appearance Agreement](#) signed and executed by speaker & authorized UMKC personnel prior to the event. These funds cannot be used for alcohol. If being used for meals, reimbursement can be done if preferred by program. *Graduation expenses can be covered once GME graduation funds are used.*
- GME approved resident electives support. *Approval of such electives must be pre-approved by the Financial Advisory Committee per rotation at Non-Affiliated Sites Policy.*
- Travel expenses related to all residents (or all of the same program year) attending an educational medical society/organization academic meeting. Travel must comply with the [UMKC School of Medicine Travel Policy](#) and [UM System Business Policy 500 on Travel](#). Hotel, registration, and airfare can be direct payment or reimbursement. All other travel related items are reimbursement.
- 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 maybe be too fatigued to safely return home on their own and then back to retrieve their vehicle in this circumstance, if needed. This will be a reimbursement to the resident.

**Items that are starred are considered a taxable benefit.*

Resident Recruitment Expenses:

- Materials including copying, brochures, and other printed materials.
- Applicant lodging and transportation
- Food/Meals (excluding alcoholic beverages and parties) in compliance with [UM System BPM-219 Travel and Other Business Expenses](#). Reimbursement can be done if preferred by program
- Gifts and souvenirs expenses for applicants must comply with [UM System BPM-216 Awards, Gifts, & Prizes](#).

Awards:

- Award 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.
- In compliance with [UM System BPM-216 on Awards, Gifts, & Prizes](#), awards to Residents or Fellows are considered additional pay and taxable. They will be direct deposited and added to their monthly paycheck.

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. *Travel must be preapproved by the SOM Travel Committee (if active)*. 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 faculty that enhance residency program and comply with [UM System BPM-215 on Organizational Dues & Memberships](#). *Must provide documentation that membership allows access to guides, examinations, training, etc. that could not be obtained without a membership.*

GME FUNDS

Funds allocated in overhead to purchase the following items needed during the residency training program. Use of these funds must be done through direct payment unless otherwise stated.

Resident Education Expenses Reimbursed:

- Permanent license for Kansas and Missouri only when required by program
- Drug Enforcement Agency (DEA) registration when required by program
- 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) for all programs except Oral and Maxillofacial Surgery plus MD which will be 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: \$800 max
 - ATLS renewals for Emergency Medicine, Surgery, and Oral & Maxillofacial Surgery residents: \$525 max
 - PALS for Emergency Medicine, Oral and Maxillofacial Surgery and PGY3 Community Family Medicine residents: \$350 max
 - PALS renewals for Emergency Medicine, Oral and Maxillofacial Surgery and PGY3 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

**Items that are starred are considered a taxable benefit.*

Resident Education Expenses Purchased Directly by GME:

- Two lab coats for PGY 1 and one lab coat during each following PGY
- Missouri temporary license
- Bureau of Narcotics and Dangerous Drugs (BNDD) fee (*note: for contract year 1, will be reimbursed after resident starts the program*)
- In-service and in-training exams required for completion of residency program

Graduation Expenses:

Each Program is allocated \$300.00 per graduating Resident for the academic year.

- Rental space *If contract is required, it must be processed by the University prior to the event to be paid*
- Food, not including alcohol
- Printing of invitations
- Recognition through certificates and trophies (gifts are not a covered expense)

If being used for meals, reimbursement can be done if preferred by the program. *Once the program has used all their allocated graduation funds, program funds may be used for appropriate items*

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.

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 and requester will be notified when 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 traveling. 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
3. 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>

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 for round trip at the current mileage plus any costs of parking and tolls. The mileage reimbursement 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. 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)
4. Official documentation showing conference location and dates is required for reimbursement and must be attached to email
5. Confirmation of reimbursement will be sent to requester

Approved By:



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