

Section:	Sponsoring Institution
Document Number:	GME0026
Title:	GME Funding Policy
Responsible Department:	Graduate Medical Education
Created:	12/1/2017
Revised:	4/10/2019
Superseded:	12/1/2017
GMEC Approved:	05/23/2019
Board of Directors Approved:	07/18/2019
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POLICY

GME Funding

SCOPE

All Valley Health Team, Inc. (VHT) residencies and fellowships accredited by the Accreditation Council for Graduate Medical Education (ACGME).

PURPOSE

The purpose of this policy is to define available funding to residents and programs, including how the funding can be used and reimbursed.

PROCEDURES

There are four categories of funding available:

- Resident funds
- Research Presentation funds
- Program funds
- Graduate Medical Education funds

All funding is issued concurrent with the contract year (July 1 – June 30) and must be spent on items purchased during that year. All expenses must comply with established VHT guidelines and regulations, which are applicable for all Valley Health Team, Inc. (VHT) faculty, residents and staff.

Definitions

Resident - Resident or fellow

Reimbursement – Purchased by individual (Resident/Faculty/Program Director/Program Coordinator) and submitted through appropriate process (see payment guidelines on Page 6) for reimbursement process.

Direct Payment – Purchased by VHT on behalf of Resident/Faculty/Program Director/Program Coordinator or Program paying vendor directly.



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Taxable Benefit – Reimbursed funds that require taxes to be paid on purchase.

RESIDENT FUNDS

Each full-time resident is allotted \$1,600 annual education allowance for reimbursement of out-of-pocket educational expenses. These funds do not carry over and must be spent within the contract 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 residence
- Medical items required for residency (surgical loupes, stethoscopes, indirect ophthalmoscopes and lenses, extra lab coats or scrubs (see GME funding section, etc.).
- Professional medical society dues or fees that enhance resident education beyond those provided by the program. 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 resident's 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 Valley Health Team, Inc. Policy on Travel. Hotel, registration, and airfare can be direct payment or reimbursement.
- Boards that must be taken during residency
 * Cannot be used for boards to be taken after residency.
- Permanent medical license for California
- Drug Enforcement Agency (DEA) registration
- 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)



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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 60 days in advance complete with Program Director approval to the GME Administrator. You will receive email notification, with CC to the Program Coordinator once your request is approved. Please note research funding is limited and only available until exhausted. We will notify the Program Coordinator once annual funding has run out.

PROGRAM FUNDS

Each program is allocated \$1,000 per resident/fellow in their program that. Funding can be used for any resident in the program. Use of these funds must be done through direct payment unless otherwise stated below.

Resident Education Expenses:

- 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.
- 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 authorized
 by program 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.
- 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
 VHT Travel policy. Hotel, registration, and airfare can be direct payment or
 reimbursement. All other travel related items are reimbursement.



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• 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.

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 VHT Travel and Other Business Expenses. Reimbursement can be done if preferred by program
- Gifts and souvenirs expenses for applicants must comply with VHT policy on 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 VHT policy 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 DIO of Graduate Medical Education.
 Travel must be preapproved. 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 VHT policy on Organizational Dues & Memberships and must provide documentation that membership allows access to guides, examinations, training, etc. that could not be obtained without a membership.

^{*}Items that are starred are considered a taxable benefit.



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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:

Certifications purchased from an affiliate location or VHT. If purchased from an outside source, the resident would be reimbursed

- o BLS renewals for residents after contract year 1
- o ACLS renewals for all residents after contract year 1
- o PALS renewals for all residents
- o NRP renewals for all residents

Resident Education Expenses Purchased Directly by GME:

- Two lab coats for PGY 1 and one lab coat or set of scrubs during each following PGY
- Two sets of scrubs for PGY 1
- 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, must be processed by VHT 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.



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PAYMENT GUIDELINES

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

Reimbursements must be turned in within 60 days of purchase or travel. If received after 60 days, it will be a taxable benefit.

Purchase Process (Direct-Payment)

- 1. Invoice or Quote sent to Program Coordinator
 - a. Invoice/quote must be addressed to Valley Health Team, Inc.
 - b. IT items (includes software, hardware, and online services) require DIO 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 Program Coordinator
- 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 program
 - 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. Program Director 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.



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- 2. Send email requesting reimbursement to Program Coordinator
- 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. 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 VHT email address stating they are authorizing use of their funds for this purpose.
 - ii. 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.

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 IRS by January 1 for each calendar year and posted on the Controller's website

b. Receipt(s) for 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)
- ii. Be readable (PDF is preferred format)
- c. Include funding source
 - i. For resident funds, requests must be sent from their VHT email account
 - ii. For program funds, program director approval must be included (can be attachment or part of email chain)



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- 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

Soyla A. Reyna-Griffin, CPA Chief Executive Officer

Maggie Rubio

President, Board of Directors

Date