

POLICY: Educational Funds

PURPOSE: To provide guidelines to programs who opt to provide educational funds for trainees enabling them to participate in educational conferences, purchase materials related to their education, and assist in providing additional educational tools to augment residency training.

Policy:

- Individual programs have the option to provide educational funds each academic year (currently \$500.00 maximum per academic year) for their trainees.
- Trainees beginning after September 15th will not be eligible to receive educational funds in that academic year. However, they are eligible to receive the full educational funding stipend by the last academic year of their training at UCSF Fresno.
- Educational funds are provided annually to house staff according to individual program policy. It is the individual program's responsibility to develop a policy with respect to allowable educational expenses and how residents/fellows will be reimbursed for those educational expenses.
- Items such as smart phones, laptops/computers, or other electronic devices are not allowable per this policy.
- Trainees must be on UCSF Fresno payroll no later than September 14th at the time the educational fund is requested and with the expectation of continued education for the academic year within a UCSF Fresno program.
- Trainees who are not employed by the University are not eligible for educational funds.
- Funds can be expensed back to the employee through MyExpense with receipts

Procedure:

Each program who opts to provide educational funds to their trainees will develop a program specific policy for use of educational funds. By May 31st of each year the program will notify the Associate Dean by providing the Graduate Medical Education Office (GME) with a copy of the program's policy on disbursement of educational funds for trainees for the following academic year. GME will provide Finance with a copy of the program's policy and a list of eligible trainees (by September 15th annually) who are to receive educational funds for the current academic year. Trainees may begin requesting reimbursement as of July 15th of each academic year for expenses incurred during that academic year. Receipts should be dated no earlier than July 1st.

Educational Funds through Programs

Residency programs may provide trainees with educational funds through the program. Programs must address in their policy how they will determine eligible expenses in accordance to University policy. Trainees must be instructed to submit receipts to their program within 10 days of the purchase. Programs must submit expenses/receipts to Finance through MyExpense as they are received from trainees throughout the academic year. Expenses submitted more than 45 days from purchase will become taxable to the trainee. All receipts for a given academic year **MUST** be received no later than May 31st to allow time for the reports to go through the approval process. **NO EXPENSES SHOULD BE INCURRED IN JUNE.**

Requests for reimbursement of expenses will be processed from August 1st – May 31st each year for returning trainees. New or off-cycle trainees will need to be confirmed on the house staff roster before they will be reimbursed.

Programs will be responsible for the preparation of University documentation for reimbursement of funds through MyExpense. Receipts and reimbursement requests must be entered into MyExpense within 30 days of purchase.

(Original signed Policy is available in the UCSF Fresno Graduate Medical Education Office)