

ELIGIBLE EXPENSE GUIDELINES EDUCATION ENHANCEMENT (EE)

**Pre-approval from PGME is required for items not listed*

GENERAL GUIDELINES:

The Postgraduate Medical Education (PGME) office at the Cumming School of Medicine, University of Calgary is publicly funded. All expenses incurred on behalf of PGME must reflect prudent and economical use of resources, good judgment, and be defensible to an impartial observer. All expense reimbursements must adhere to the University of Calgary [Travel and Expense Regulations and Guidelines](#)

Contracts, Agreements, Quotes: In order to adhere to University of Calgary policy and limit legal liability, all contracts, agreements and quotes (irrespective of the dollar value) that contain terms and conditions and require a signature must be set up between the supplier and “The Governors of the University of Calgary” and sent directly to Supply Chain Management (SCM) (scmhelp@ucalgary.ca) or the PGME business administrator assigned to your program for signing. Individuals outside of SCM do not have signing authority to sign off on third party agreements/contracts on behalf of the Governors of the University of Calgary.

Invoices: All invoices must be made out to the **University of Calgary** which must be displayed on the first line and include an invoice number and date.

Deposits: Expenses related to deposits for future events are **limited to 50%** of the total contract amount with the balance to be paid in a timely manner closer to the event date and within the stipulation of the contract. The required deposit amount must be clearly stated in the contract and payment will be limited to the contractual deposit amount. Only deposits with an underlying contract can be paid by T&E Card. Deposits are never allowed to be paid by PCard.

The University of Calgary will not cover cancellation/no show fees with the exception of illness or circumstances beyond the individual or program’s control. Further background information or rationale may also be required by Compliance and Eligibility in order to approve of these charges.

COVID-19: The Alberta government defines a “*gathering*” as any event or assembly that ***brings people together in the same space at the same time***. Currently all public health measures have been lifted including:

- social gatherings – there are no longer capacity limits on either indoor or outdoor gatherings
- recreation, performance and entertainment activities
- business closures and capacity restrictions
- large events, including concerts, sporting events, exhibitions and festivals

Mask use in certain public indoor and outdoor settings is still required by AHS, the University of Calgary and the City of Calgary. Please refer to the applicable organization’s website for the most up to date information.

Risk Management for University Events

The University of Calgary defines EVENTS as one-off gatherings of 15 people or more (outside of classes and regular business meetings). **Routine academic gatherings** such as academic half-day, journal club, simulation and education sessions or routine committee meetings DO NOT require registration with risk management. **One-off events** such as Retreats, Research Day, Orientation Day, Graduation, Team Outings, Wellness Activities, with 15 or more attendees DO require registration with risk management.

Any event that has expenses that are paid for or reimbursed through the University accounting structure are considered University or UCalgary events. All UCalgary events are insurable provided:

- The event is taking place in a commercial or public space
- All contracts and agreements are reviewed and signed by Supply Chain Management at the U of C
- Monitored by the program director or designate
- Approved by the Department (PGME)

*It is NOT recommended that events be held on private property as any liability is the sole responsibility of the property owner.

- Please ensure that you have completed the [UCalgary Event Registration Tool](#) a minimum of **2 weeks in advance**.
- Event organizers are required to ensure that all attendees, including speakers, are aware of any public health actions/measures in effect at the location of their Event.
- All contracts for Events are required to be sent to Supply Chain Management for review prior to signature to ensure that the appropriate cancellation clauses are included.
- The 7 Steps for Planning an Event or Conference must be reviewed to ensure that the Event Organizer can comply with UCalgary requirements.

[Read more details about the process here.](#)



**Risk Management should be advised of any activities of a high risk nature included as part of the agenda to determine whether a waiver is required.*

EVENTS - GENERAL GUIDELINES:

- All events must meet the definition of a “gathering” and fall within the current restrictions
- Catering is not permitted for events held virtually or for those that attend a “gathering” virtually
- All events require an agenda and a complete list of attendees
- Venue & A/V equipment, room rentals and facilitator fees are eligible expenses
- Dollar maximums indicated include all taxes, GST, gratuities, etc.

Educational Events: Defined as an annual or infrequently occurring event outside of normal programming or activities that are more formal in nature with a focus on residency education. These include:

- Awards Events
- Graduation Events
- Orientation Day
- Research Day
- Retreats (RTC Retreats, Residency Education, Residency Program Review)
- Seminars
- Symposia

Funding for accommodation, meals, and activities is limited to residents and the attendees included in the agenda as having a key role at the event (i.e. Presenters, Speakers, Program Directors, Program Administrators and relevant Faculty Members). Expenses for any additional attendees must be included in the maximum allowable budget based on the total number of funded participants or be processed through other funding sources.

Accommodation - Maximum \$200 per night per funded participant

Meals - Maximum \$85 per day, per funded participant

Breakfast	\$20 per funded participant
Lunch	\$25 per funded participant
Dinner	\$40 per funded participant

Wellness Activities as part of an Educational Event - Maximum of \$50 per funded participant to an overall maximum of \$1500 per event

Program Enhancement & Development Sessions: Defined as workshops or development meetings with a focus on specific discussion relating to residency program curriculum. Although there may be limited or no residents present, the outcomes from the session provide education enhancement to all residents. These include:

- Curriculum Development
- EPA mapping and review (not covered by CBD funding)
- Chief resident meetings
- Curriculum and Assessment review

Funding for meals is limited to residents and the attendees included in the agenda as having a key role at the event (i.e. Presenters, Speakers, Program Directors, Program Administrators, and relevant Faculty Members). As these sessions may take place over several hours or the entire day the following maximums apply:

Meals - Maximum \$85 per day, per funded participant (or)

Breakfast	\$20 per funded participant
Lunch	\$25 per funded participant
Dinner	\$40 per funded participant

Accommodation and wellness expenses are not eligible for these sessions.

Team Building / Wellness Events: Defined as events that promote cooperation, increase motivation, improve physical and mental health and generally aid a group to work more effectively and take place outside of routine programming and activities. These include:

- Sports Day
- Team BBQ
- Team Outings
- Wellness Activities

*Preapproval is required for any activities or events considered to be of a high-risk nature.

*Preapproval is required for expenditures related to team building rewards.

Funding for meals is limited to residents and the attendees included in the agenda as having a key role at the event (i.e. Presenters, Speakers, Facilitators, Instructors, Program Directors, Program Administrators, and relevant Faculty Members). As these sessions may take place over several hours or the entire day the following maximums apply:

Meals - Maximum \$85 per day, per funded participant (or)

Breakfast	\$20 per funded participant
Lunch	\$25 per funded participant
Dinner	\$40 per funded participant

Team Building clothing and accessories - maximum \$50 per resident per fiscal year. (*Staff purchases are ineligible)

Total annual funding limit – Maximum \$300 per resident per fiscal year.

Other Education Expenditures - Gifts of Recognition

The intention of this guideline is to provide the ability to acknowledge individuals for contributions to residency education, above and beyond their regular roles, and for something for which they are not currently receiving compensation, i.e. a guest speaker, patient honoraria, participation in research, etc. Although residents may be considered for this category, recipients are typically not currently in training themselves but rather providing a contribution to residency education. More commonly these gifts are used as awards to encourage and acknowledge achievements related to **residency education activities** such as outstanding teaching or mentoring, winners of scholarly activities, research activities etc.

Recognition of personal events (birthdays, holiday, graduation, etc.) are not eligible under AH funding.

- Gifts for non-cash items such as award plaques, pens, etc. - maximum \$100 per recipient.
- Gifts of recognition such as gift cards, gift certificates, travel vouchers that are considered equivalent to cash are limited to a maximum \$100 per recipient. Recipients that are University of Calgary employees are not eligible to receive gifts that are considered to be equivalent to cash.
- Visiting Speakers - maximum \$3,000.00 for accommodation, travel and honorarium (or gift in lieu).

**When arranging the visit of a speaker coming from outside of Canada, approval must be obtained from HR Immigration at the University of Calgary. This approval process needs to be completed by the Program Director or Program Administrator well in advance of the speaker arriving in Canada. The approval given by HR Immigration must be included as a supporting document to PGME when requesting expense reimbursement for the visitor. For assistance with the approval process please contact the ISC hr@ucalgary.ca or HR immigration himmigration@ucalgary.ca*

Additional information regarding gifts can be found in Sections 8.1, 8.2 and 8.3 in the U of C Travel and Expense Reimbursement document at the link below:

<https://www.ucalgary.ca/finance/files/finance/ap-travel-and-expense-reimbursement-handbook.pdf>

Equipment & Resources

**Please note: Infrastructure funding may be available for equipment purchases or renovations greater than \$5,000. Applications may be submitted to PGME during the annual call for proposals in April-May.*

It is the responsibility of the program and/or department to advise PGME when items are delivered and received directly rather than through the University of Calgary. This enables PGME staff to complete the procurement process.

- Computers and accessories (LCD Projector, printer, digital camera)
- Consultant Fees
- Electronic Subscriptions, Software and Updates
- All purchases or renewals of electronic subscriptions, software and updates must be brought to the attention of Information Technologies (IT) by completing the Software Request for Personal and / or Lab computers via the UofC Portal https://ucalgary.service-now.com/it?id=it_catalog. IT approval must be received before the purchase is made. Please note there is an approximate eight- week turn around period on these requests.
- UpToDate can be purchased through EE funding.
- Subscription duration may not exceed the residency term of the resident.
- Furnishings/minor renovations for educational spaces
- Library Development – Books
 - Books purchased remain the property of the program. These books may be offered to a resident for any length of time, however the book must be returned to the program upon completion of training
 - All textbooks should be procured through the medical bookstore (medicalbookstore@ucalgary.ca) via IDB.

- Research/Biostatistical Support
- Teaching Models
- Teaching Resources
- Other items upon approval

Educational resources and equipment may be purchased for use by the residency program. Equipment purchases intended for clinical use are NOT eligible and should be procured through AHS. All resources remain the property of the University of Calgary, including equipment such as software, laptops, iPads, etc. Purchases for the sole use by individuals are not eligible.

Computer equipment should be procured directly through the University of Calgary Information Technology Services by completing the order request through the UofC Portal https://ucalgary.service-now.com/it?id=it_catalog The purchase will be completed via interdepartmental billing (IDB). In the event that a product is unavailable, it is preferable that the item be procured through PGME.

Equipment over \$5,000.00 must be procured through PGME.

For equipment or other purchases over \$25,000.00, Supply Chain Management (SCM) requires a minimum of three supplier quotations for any goods or services purchased. In the event only one suitable supplier exists, a sole source form is required. Please refer to the purchasing handbook for more information:

<https://www.ucalgary.ca/finance/files/finance/scm-purchasinghandbook.pdf>

Travel *(All travel must fall within the current restrictions related to COVID-19)*

Airfare: Reimbursement will not exceed the equivalent of economy fare by the most direct route. Any additional costs such as stop-overs for personal reasons will not be eligible unless proof of a price comparison to ensure cost effectiveness is obtained *prior* to departure and submitted with the claim. It is expected that the price comparison not exceed the economy fare by the most direct route

Reimbursement for travel is available at the rates indicated for the events listed below provided the event occurs at a location at least 50 kilometers away from the city limits of the community where the majority of duties are normally performed.

- Conferences - maximum \$2000 per resident per conference
- Courses - maximum \$2000 per resident for travel and course registration plus an additional \$250 per day for meals and accommodation to a maximum of \$3000. These maximums are distinct from one another and cannot be combined.
- Examinations – maximum \$1000 per resident for travel to RCPSC & CFPC exams and other exams deemed mandatory by the program.
- Mandatory Rotations – maximum \$1000 per resident for travel plus an additional \$250 per day for meals and accommodation to a maximum of \$3000. These maximums are distinct from one another and cannot be combined.
- Other travel upon approval.

Remediation and Probation Support

Remediation or Probation can include additional clinical support, additional didactic support or the services of third-party organizations or individuals, e.g. communication consultants, professionalism coaches. The funding source for this support is determined by the status of the resident.

- Payment for remedial clinical support will be paid at the remediation rate of \$2,600 per four- week block for teaching up to a maximum of 12 weeks per residency (\$7,800 in total). The clinical preceptor (or the related program) will need to submit a summary of the services provided and the related time periods as support for the payment requested.
- Payment for remedial didactic support will be paid at a rate of \$150 per hour up to a maximum of \$900 (6 hours). The didactic preceptor (or the related program) will need to submit a summary of the services provided and the related time periods as support for the payment requested.
- Note: Preceptors who are already Geographically Fulltime (GFT) or who are part of an Alberta Academic Medicine and Health Services Plan (AMHSP) cannot be paid additional amounts for providing remedial support.
- Third party organizations or individuals must submit a formal invoice to the University of Calgary for payment, based on the original remediation/probation contract. Funding for these services will be subject to the same maximum amount as in didactic support i.e. \$900 per resident per remediation/ probation period.

Guideline Notes

All resident EE related expenses must occur during the course of residency and cannot extend past the residents training completion date.

Please note that failure to follow these guidelines when submitting expense claims may lead to delays in payment and/or claims being denied. Expenses must be submitted to PGME within 6 months of events/purchases. Failure to submit expense claims in a timely manner may result in the claim being declined.

Exclusions *The following Expense Categories are considered INELIGIBLE

- Abstract publishing
- Alcohol
- Books for the sole use of individuals
- Catering should be restricted to formal events and is therefore ineligible for the following routine events:
 - Academic Half –Day
 - Accreditation – Internal Reviews
 - Committee Meetings
 - Journal Club
 - Lunch-time education sessions
 - Rounds

**Unless in association with a visiting speaker*
- Cell phone bills

- Customized promotional products such as lanyards, tote bags, key rings, etc.
- Donations / Sponsorships
- Electives (non-mandatory rotations)
- Funding support for a resident prior to an event occurring
- Gifts of recognition deemed to be of a personal nature (birthdays, holidays, graduation, certificate framing, etc.)
- Individual expenses for non-ministry funded residents
- Items covered under the PARA agreement by AHS (pagers, lab coats, life support courses, chief resident stipends)
- Laptops, iPads and software for clinical use or for the sole use of individuals
- Memberships (*except when required for the Program Director and/or Program for Conferences and exam attendance)
- Non-essential furnishings for office space
- Office Supplies (*except when required for educational workshops or sessions)
- RCPSC & CFPC exam fees
- Rotations funded by DLRI and RPAP
- Top-ups for Chief Resident stipends