ELIGIBLE EXPENSE CATEGORIES
EDUCATION ENHANCEMENT (EE)
ALBERTA INTERNATIONAL MEDICAL GRADUATES (AIMG)

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

Contracts, Agreements, Quotes, Invoices

Please note: 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. 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.

Educational & Team Building Events

All events require an agenda. Events involving food or accommodation require a list of attendees. Funding for event meals is limited to a maximum of $75 per resident and the attendees included in the agenda as having a key role at the event (i.e. Presenters, Speakers, Program Directors and Program Administrators). 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. These events include:

- Awards Events
- Graduation Events
- Orientation Day
- Research Day
- Seminars
- Symposia
- Workshops

Retreats: All retreats require an agenda and a list of attendees. 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 and Program Administrators). 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 - A maximum $200 per night per funded participant, (including all taxes and additional fees)
• Meals - A maximum $75 per day per funded participant
• Wellness Activities – A maximum of $50 per funded participant to an overall maximum of $1500 per event

Ideas for retreats may include the following:
• RTC Retreats
• Residency Education
• Residency Program Review
• Team Building with respect to education and/or residents

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 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.

Expenses for venue & A/V equipment, room rentals and facilitator fees are eligible for educational events.

Other Education Expenditures:

• 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. Recognition must be related to residency education activities. Recognition of personal events (birthdays, holiday, graduation, etc.) are not eligible under AH funding. Recipients that are University of Calgary employees are not eligible to receive gift cards.
• Team Building, Sports Day, and Wellness activities that are not part of a retreat - maximum $300 per resident per fiscal year. Preapproval is required for any activities or events considered to be of a high-risk nature.
• Team Building clothing and accessories - maximum $50 per resident per fiscal year. (*Staff purchases are ineligible)
• Visiting Speakers - maximum $3,000.00 for accommodation, travel and honorarium (or gift in lieu).

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:

**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) (itsupport@ucalgary.ca) and cleared with IT before the purchase is made. Please note there is an approximate eight-week turn around period on these requests.
  - Up to Date can be purchased through EE or AIMG funding.
- Furnishings/minor renovations for educational spaces
- Library Development – Books
- Research/Biostatistical Support
- Salary Support (AIMG funding only)
- Teaching Models
- Teaching Resources
- Other items upon approval

Educational resources and equipment may be purchased for use by the residency program, however equipment purchases for the sole use of individuals are not eligible (*e.g. software, laptops, ipads for personal use*).

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](https://www.ucalgary.ca/finance/files/finance/scm-purchasinghandbook.pdf)

Computer, software and accessories should be procured directly through the Microstore (mstore@ucalgary.ca) via interdepartmental billing (IDB). In the event that a product is unavailable, it is preferable that the item be procured through PGME.
All textbooks should be procured through the medical bookstore (medicalbookstore@ucalgary.ca) via IDB.

**Travel**

- 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.

**General**

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
- 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
  - Donations
  - 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 (e.g. pagers, lab coats, life support courses, chief resident stipends)
  - 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