

Title RESIDENT PHYSICIAN TRAVEL APPROVAL AND REIMBURSEMENT	
Portfolio Physician Services – Medical Education Office	Version 14 Mar 2022

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PURPOSE

Resident Physicians are often required to travel to other communities for their training. The purpose of this document is to describe the different types of travel and the requirements for approval and funding.

CONSIDERATIONS FOR OUT OF PROVINCE TRAVEL

As Resident Physicians are deemed to be workers under the *Workers Compensation Act – Alberta* revisions were made to the *Resident Physician Agreement* under Article 31 and the “Letter of Understanding: Out-of-Country Training Opportunities”. While there are no numeric limits to the amount of time a Resident Physician may spend out-of-province, there are several additional factors to be considered when planning and approving any travel:

- the opportunity must satisfy the standards of training (including assessment) and enrich the residency experience in a way that is not available locally;
- the opportunity must not impose any unreasonable burden on the home program’s clinical service that cannot otherwise be offset by the program schedule, off-service residents, or visiting elective residents;
- risks related to security and public health in the region and country of travel have been assessed and measures put in place to ensure safety; and
- jurisdictional requirements have been identified to ensure compliance with:
 - no-fault occupational insurance legislation (e.g. WCB);
 - immigration (including the USA J1 Visa process);
 - professional registration/licensure;
 - professional liability protection (CMPA does not provide protection in the USA);
 - emergency medical and repatriation coverage;
 - for those insured by the Alberta Health Care Insurance Program...
<https://www.alberta.ca/ahcip-coverage-outside-alberta.aspx>
 - for additional coverage within the PARA Benefits Plan...
<https://insite.albertahealthservices.ca/hr/Page4597.aspx>

Location	Scenario	Approval Process
Within Canada	Canadian qualifying and certifying exams	Follow the paid Exam Leave Process per Article 13 of the <i>Resident Physician Agreement</i> .
	PARA Business	Follow the paid PARA Business provisions of Article 8 of the <i>Resident Physician Agreement</i> . Requests for paid leave must be submitted to the Program Director. Resident Physicians must be meeting expectations within their training.

Location	Scenario	Approval Process
Within Canada	Courses and conferences.	Follow the Educational Leave Process per Article 12 and “Letter of Understanding: Out-of-Country Training Opportunities” of the <i>Resident Physician Agreement</i> . The Program Director may approve paid opportunities less than 14 days. Opportunities 14 days and longer must also be submitted to the Medical Education Office for approval.
	Clinical Rotations (out-of-province)	Subject to Article 31 of the <i>Resident Physician Agreement</i> . Travel must be approved by the Program Director and Associate Dean. Notification to the Medical Education Office is required to prepare WCB coverage in the receiving province. Additional process notes are detailed in the section below.
Within the USA	US Medical Licensing Examination.	Follow the unpaid Exam Leave Process per Article 13.04 of the <i>Resident Physician Agreement</i> .
	Courses and conferences.	Follow the Educational Leave Process per Article 12 and “Letter of Understanding: Out-of-Country Training Opportunities” of the <i>Resident Physician Agreement</i> . The Program Director may approve paid opportunities less than 14 days. Opportunities 14 days and longer must also be submitted to the Medical Education Office for approval.
	Clinical Rotations	The Medical Education Office continues to work on a solution, but currently has no mechanism for obtaining WCB in the USA to ensure compliance with Article 31 and the “Letter of Understanding: Out-of-Country Training Opportunities” of the <i>Resident Physician Agreement</i> . Follow the General Unpaid Leave Process per Article 10 of the Agreement. <i>Note: the Canadian Medical Protective Association will not provide protection for medicolegal issues arising from work in the USA. Resident Physicians will need to obtain alternate insurance.</i>
Outside North America	Courses and conferences.	Follow the Educational Leave Process per Article 12 and “Letter of Understanding: Out-of-Country Training Opportunities” of the <i>Resident Physician Agreement</i> . The Program Director may approve paid opportunities less than 14 days. Opportunities 14 days and longer must also be submitted to the Medical Education Office for approval.
	Clinical Rotations (out-of-province)	Subject to Article 31 of the <i>Resident Physician Agreement</i> . Travel must be approved by the Program Director and Associate Dean. Notification to the Medical Education Office is required 6 months in advance to investigate and navigate the WCB requirements within the receiving jurisdiction. If the Medical Education Office is unable to navigate the no-fault occupational insurance requirements of the receiving jurisdiction the Resident Physician will be directed to follow the General Unpaid Leave Process per Article 10 of the Agreement. Additional process notes are detailed in the section below.

Note: some opportunities in the USA are described “observerships”. If they are formal learning experiences, the Program Director may support the opportunity as a “course”. Clinical job shadowing typically does not satisfy the conditions for experience leading towards certification and are treated as General Unpaid Leave.

PROCESS FOR CLINICAL ROTATIONS IN OTHER PROVINCES

Per Article 31.02 of the *Resident Physician Agreement*:

1. Resident Physicians must first obtain approval from their Program Director and Associate Dean. Include details regarding the purpose of the rotation, travel start and end dates, location of the rotation, and duties during the rotation (clinical, research, classroom). Resident Physicians should identify any expectations for assessment and on-call participation in advance to ensure program requirements and call stipends are addressed.
2. The PGME office will forward the training request approval to the Medical Education Office (CAL.MedicalEducationOffice@ahs.ca) within 90 days (the timeline is defined by the Agreement, though there is leniency at the beginning of the academic year).
3. The Medical Education Office will prepare the necessary information for Payroll Accounting to register the WCB account in the respective province/territory.

Resident Physicians may report workplace incidents through AHS's incident reporting system or the host site.

PROCESS FOR CLINICAL ROTATIONS IN OTHER COUNTRIES

Per "Letter of Understanding: Out-of-Country Training Opportunities" of the *Resident Physician Agreement* travel must be approved by the Program Director and the Associate Dean and forwarded to the Medical Education Office for review and approval at least 6 months in advance of the planned travel. The Global Health & International Partnerships office provides bursary opportunities for electives in low or middle income countries, but also plays a critical role in connecting the request to the Risk Management & Insurance Office (<https://iac01.ucalgary.ca/RiskMgmt/>) and supporting the travel clinic counselling, pre-departure briefings, and registration with the Foreign Affairs and International Trade Canada.

Travel requests are reviewed on a case-by-case basis and the risks and challenges of travel vary by jurisdiction. The following is a sample timeline:

1 Year Ahead

1. Resident Physicians should start discussing the opportunity with their Program Director, identify a faculty mentor and start to layout their learning objectives.
 - Review the University International Travel policies and resources <https://www.ucalgary.ca/risk/risk-management-insurance/travel>
 - Research the country details:
 - Check the Canadian travel advisory website <https://travel.gc.ca/travelling/advisories>.
 - Jurisdictional requirements for professional registration and immigration.
 - Identify all necessary vaccinations and medications (these may take several weeks to complete may need to start before approval is obtained).
 - Public Health Agency of Canada <http://www.phac-aspc.gc.ca/>
 - Travel Health Clinics, Public Health Agency of Canada <http://www.phac-aspc.gc.ca/tmp-pmv/yf-fj/index-eng.php>
 - US Centers for Disease Control and Prevention (CDC) <https://wwwnc.cdc.gov/travel/destinations/list> .

9 Months Ahead

2. Resident Physicians will contact the Global Health & International Partnerships office (inhealth@ucalgary.ca) to obtain the application documents and instructions. Even if not applying for a bursary or travelling to a low or middle income country, Resident Physicians should prepare:
 - Known details regarding the anticipated travel dates, location, preceptors and duties during the rotation (clinical, research, classroom).
 - Emergency Contacts.
 - A summary of what they expect to experience and how it will enrich their residency.

- A written description of their personal learning objectives for the rotation including 3 learning objectives following the CanMEDS framework.
 - If a research project is a component of the rotation, the Resident Physician should also describe the project and attach Ethics approval.
3. Resident Physicians will submit their requests to their Program Director for review and approval.
 4. The Program Director will assess the merits of the request, ensure the experience satisfies the principles for out-of-country travel, and ensure the Resident Physician is progressing as expected within the program.
 5. The Program Director will forward their approval to the Associate Dean for review and approval.

6 Months Ahead

6. Once approved by the Associate Dean, the request will be forwarded to the Medical Education Office (CAL.MedicalEducationOffice@ahs.ca) and the Global Health & International Partnerships office (inhealth@ucalgary.ca). Requests must be received by the Medical Education Office no less than 6 months prior to the planned travel.
7. Within 30 days, the Medical Education Office will response and will work with the Resident Physician to discuss the potential risks related to the training opportunity and the potential for arranging required coverages, including health benefits and AHS-paid Workers' Compensation Board coverage or alternative.
8. AHS will make every reasonable effort to make all necessary arrangements to mitigate the risks for both the Resident Physician and AHS, including, where feasible, registering as an employer and complying with local insurance requirements in the receiving jurisdiction.
 - Where all necessary arrangements are completed prior to commencement of the opportunity, the Resident Physician shall be deemed to be on an approved training rotation. Most countries outside North America and Europe do not have compulsory no-fault occupational insurance; if the Resident Physician is still functioning within their role as they would in Canada and the experience is less than 1 year, Section 28 of the *Workers Compensation Act - Alberta* will extend protection to the Resident Physician (but will not include protection from litigation if the Resident Physician's activities injure another worker or damage other property).
 - Where it is not possible to obtain the required coverage prior to the commencement of travel, and the Resident Physician chooses to pursue the opportunity, the Resident Physician will be placed on an unpaid leave of absence with AHS and the terms of this Agreement shall have no application until the Resident Physician returns to provide health services at an eligible Training Facility.
9. For low or middle income countries, the Global Health & International Partnerships will arrange travel clinic counselling, a pre-departure briefing and registration with the Government of Canada (<http://travel.gc.ca/travelling/registration>).
10. Resident Physicians must also ensure they have obtained the necessary professional liability protection and satisfied the requirements within the host jurisdiction for professional registration/licensure and immigration.

Appendix 1: ADDITIONAL ADVICE FOR RESIDENT PHYSICIANS TRAVELLING INTERNATIONALLY

1. Make sure your passport is valid for at least six months AFTER your return date. If not, apply for a new passport.
2. Visit your dentist and family physician to refill regular prescriptions if necessary.
3. Review your emergency medical coverage and purchased supplementary insurance:
 - Alberta health Care Insurance Program
<https://www.alberta.ca/ahcip-coverage-outside-alberta.aspx>
 - PARA Benefits Plan
<https://insite.albertahealthservices.ca/hr/Page4597.aspx>
4. For experiences with direct or indirect patient care service delivery:
 - Complete the necessary professional licensure requirements.
 - Contact a malpractice insurance broker and purchase adequate coverage for your international experience.
5. Register with the University of Calgary Travel Registration system (<https://www.ucalgary.ca/risk/risk-management-insurance/travel/register-travel>).
6. Review support available through Global Health (<https://cumming.ucalgary.ca/community/opportunities/global-health-electives-and-experiences>).
7. Use a travel agent who may assist you in the case of missed flights or other travel disruptions.
8. Prepare for emergency situations:
 - Revisit the Canadian travel advisory website for regular updates
<https://travel.gc.ca/travelling/advisories>.
 - Review and update your Emergency Contact information.
 - Record the University of Calgary Emergency Security Dispatch phone 1-403-220-5333 (call collect) and email assist@ucalgary.ca.
 - Record the International SOS number +1 (215) 354-5000 (call collect) and register for alerts
<https://www.ucalgary.ca/risk/risk-management-insurance/travel/in-case-of-emergency>.
 - Also download the SOS International Emergency App <http://app.internationalsos.com> and enter the university's membership number 27AYCA093142.
 - Record the Canadian Consular Emergency Assistance (Ottawa) phone +1 613 996 8885 (call collect).
 - Print the UofC Emergency Assistance wallet card <https://www.ucalgary.ca/risk/risk-management-insurance/travel/before-you-go> which has a collection of important websites, phone numbers and instructions in the event of an emergency abroad.
 - Register with the Registration of Canadians Abroad (ROCA)
<https://travel.gc.ca/travelling/registration>.
 - Contact your bank and provide your dates abroad including your flight route/stopovers.
 - Contact your Credit Card Company and request for them to monitor daily activities.
 - Give copies of your travel documents, including passports and placement details, to family/friends.
 - Call your cell phone provider to inquire about roaming fees or unlocked your device.
 - Create a Skype or Viber account for easy communication with friends and family while abroad.
 - Confirm the exact address of your accommodation.
9. Backup your information:
 - Email yourself scans of important documents: emergency contact resources, passport, tickets, International Experience Proposal, etc. Use an email account accessible worldwide.
 - Backup your hard drive if traveling with a laptop.
10. Finalize your travel plans with your host preceptor including pick-up at airport if possible.
11. Pack light and ensure you have the following:
 - Seasonal, country, and culturally appropriate clothing.
 - Yellow fever booklet (if applicable).
 - Copies of your medical school diploma and medical license.
 - International Experience Proposal and Travel Documents.

- Cell phone, laptop and camera batteries and chargers.
 - Foreign currency.
12. Arrange for payment of your bills during your absence, empty your refrigerator of perishables, leave your house keys with family/friends, lock windows and doors, and set-up out-of-country replies on email.

Appendix 2: REIMBURSEMENT OF MANDATORY TRAVEL EXPENSES (ROTATIONS REQUIRED BY THE PROGRAM AND NOT AVAILABLE LOCALLY)

At the beginning and end of shifts and to respond while on-call, Resident Physicians (like other workers) are responsible for the costs of transportation between home and the place of work. If a resident has been required to travel between sites during a shift, or if the Resident Physician has elected to undergo a rotation in another community for which they are responsible for the costs they may be eligible to identify the costs as a tax deduction as supported by the T2200 Form “Declaration of Conditions of Employment”. T2200 Forms are printed and mailed by Payroll around March of each year to the Resident Physician’s address in ePeople.

If a Resident Physician has been required to complete a mandatory rotation in another community in order to satisfy requirements of the College of Family Physicians of Canada (CFPC) or Royal College of Physicians and Surgeons of Canada (RCPSC) that are not available locally, the Resident Physician is eligible to be reimbursed for the costs of travel and accommodation.

- For rural rotations, this will occur first through Distributed Learning and Rural Initiatives (DLRI) in the University of Calgary (<http://cumming.ucalgary.ca/ruralmedicine/postgraduate>). DLRI only funds the initial transportation to and final transportation from the elective rotation. If the rotation is two or more consecutive blocks the Resident Physician may be eligible for reimbursement of a return trip between each block that can be requested through the Medical Education Office (MEO); the community must be more than 50km from the city limits of the Resident Physician’s normal community of training.
- For other mandatory rotations (typically in subspecialty programs with established inter-university affiliation agreements) , Article 34.01 “Remote Mandatory Training” of the Resident Physician Agreement supports Accommodations up to \$1000 per month and one round trip for every 4 weeks to a maximum of \$1000 per trip (or subject to prior approval if greater) to be reimbursed through the MEO.

All travel and accommodation is subject to the Travel, Hospitality, and Working Session Expenses Policy <https://www.albertahealthservices.ca/Assets/about/policies/ahs-pol-expenses.pdf>. Reimbursement requests to be paid by Alberta Health Services are submitted to the MOE through iExpense as detailed below.

TRAVEL EXPENSE REIMBURSEMENT FROM AHS

The MEO reimbursement is primarily limited to return trips between consecutive rural rotations not otherwise funded by DLRI or the academic program (must be >50km from city-limit to city-limit).

Pre-approval

All resident travel must adhere to the approval processes described earlier in this document. For expense reimbursements, additional pre-approval (<https://insite.albertahealthservices.ca/Main/assets/frm/frm-19384.xlsx>) required for out-of-province expenses and expenses that exceed the thresholds set by the Resident Physician Agreement (Accommodations up to \$1000 per month and one round trip for every 4 weeks to a maximum of \$1000 per trip) and should be emailed to Robert.Bunn@ahs.ca.

NOTE: All travel and accommodation is subject to the Travel, Hospitality, and Working Session Expenses Policy <https://www.albertahealthservices.ca/Assets/about/policies/ahs-pol-expenses.pdf>. As well, the AHS Travel Management Program (<http://insite.albertahealthservices.ca/travel.asp>) may provide opportunities for discounts on travel and accommodation.

iExpense

Reimbursement requests must be submitted using the iExpense electronic system which will require a one-time “Introduction to iExpense – (without DOAA)” module training to obtain login information. The training is accessed through MyLearningLink (<https://insite.albertahealthservices.ca/hr/Page1881.aspx>). Once complete, please allow up to 5 business days for the iExpense/Oracle user ID and password to be sent to the Resident Physician’s AHS email address.

For support, contact: ahs.aphelpdesk@ahs.ca or call 1-877-595-0007, Option 2.

Reimbursement Request

Alberta Health Services has implemented electronic expense processing to improve tracking, follow-up, and turnaround times. Residents are required to take the iExpense training before you will be able to submit your first claim.

1. Login to iExpense (<http://insite.albertahealthservices.ca/11122.asp>) using your Oracle user ID and password (this is different from your AHS network account and can only be obtained after completing the mandatory training). Then browse to “AHS Internet Expenses”.
2. At the top of the Expenses Home Page, select “Create Expense Report”. Select the Expense Template “PARA”, provide a title that clearly describes the location and the start and end dates of the rotation (e.g. “Rotation – Toronto 180926 to 181023”), and click “Next”.
3. For each itemized receipt, complete a line item within the “Receipt-Based Expenses” tab.
 - Start Date = date on the receipt
 - Receipt Amount = eligible expense
 - Expense Type = select most appropriate (use “miscellaneous” for criminal record checks and registration fees).
 - Business Reason = “Mandatory Rotation” and description of the expense
 - Expense Location = “AB – Other Zones” if attended in Edmonton or “ON” for Toronto rotations.
4. If you used your own car, you may claim mileage on the “Mileage Expenses” tab.
 - Start Date = travel date
 - Expense Type = “Mileage-Other”
 - Business Reason = e.g. “Mandatory Rotation – Edmonton April 5 to May 27 – return trip April 28”
 - Trip Distance = mileage in KM

For each expense line, click on the Details button to enter additional information including the actual travel dates (Justification = re-enter the title of the Business Reason).

For each mileage line, click on the Details button to enter additional information.

NOTE: Residents are not eligible for Per Diem Expenses.

5. Once all expenses have been added to the list, click “Next”.
6. For each expense, populate the Expense Allocation and then click “Next”.
 - Balancing = 103
 - Site = 0788
 - Functional Centre = 71880100001
7. From the summary page, review the expenses and click “Submit”. You will be prompted to email your receipts.

NOTE: Requisitions with incomplete information, missing documents, or ineligible expenses will be denied and notice sent to the Resident’s AHS email address.

Missing Receipts

Per the AHS Travel, Hospitality, and Working Session Expense – Approval, Reimbursement and Disclosure Policy (<https://www.albertahealthservices.ca/Assets/about/policies/ahs-pol-expenses.pdf>), Residents who have lost or not received a receipt for amounts up to \$200 may still request reimbursement, but must upload an Attestation with their request. A template is provided below and whenever possible, evidence of the expense should be provided (e.g. a credit card statement).

I, _____ [resident name], attest that I am unable to produce the receipt for _____ [description] totaling \$ _____ [amount] incurred on _____ [date] as _____ [reason]. This expense was incurred and was related to AHS business and has not been claimed previously.

Signed this ____ day of _____ [month], ____ [year].

Signature: _____ Printed Name: _____