Education Fund Policy
Effective from July 2017

PURPOSE
To establish a protocol for the request, submission, and reimbursement of educational funds.

PERSONS INVOLVED
Residents, Program Director, Program Coordinator, Finance Team

PROCEDURES
At the beginning of the fiscal year, which runs September 1-August 31, residents will receive $500 towards their educational fund. This fund may be used in conjunction with the remaining balance from the previous fiscal year, and expires on the last day of residency. If funds are remaining at the end of residency, those funds will be lost and deemed unusable.

PGY 1 residents are not eligible during their intern year. In lieu of an educational fund, eligible interns will receive loupes at the start of their PGY 2 year.

A resident may request reimbursement for any purchase in the categories listed in “ITEMS INCLUDED.” If an item is desired by the resident but not included in the list below the resident must fill out an “Expense Policy Exception Request form.” Please see “ITEMS INCLUDED” for more information.

The residents, coordinator, and finance team must follow the below steps in order to submit and process a reimbursement:

Step One: The resident must purchase their item and submit a “Visitor’s Expense Report” along with the receipt to the program coordinator within 60 days of purchase. Any reimbursement submitted after the 60 day mark will not be eligible for reimbursement.

Step Two: The program coordinator will review the submitted expense report and receipt.

Step Three: If the expense report and receipt have been cleared, the program director will sign a letter of approval for reimbursement.

Step Four: The program coordinator will make a copy of and submit the receipt, visitor expense report, w9, and approval letter to the finance team. A copy will be saved into the resident reimbursement folder.

Step Five: The finance team will submit the reimbursement.
Step Six: If the resident has not received a check within one month of the submitted reimbursement in step five, it is the resident’s responsibility to notify the program.

ITEMS INCLUDED

The items below are pre-approved expenses in which the residents may purchase and submit for reimbursement.

- **Memberships**- society or college memberships
- **Conference and Courses**- conferences and courses can be both in person and virtual
- **Textbooks**- hard copies or electronic textbooks and medical journals
- **Examinations**- resident who are required to take an exam (USMLE Step 3 included)
- **Renewals and License**- resident who have renewals or licenses that are coming due may use the funds to offset the cost of the renewal.
- **Loupes**- residents who enter the program in their PGY 1 year will receive loupes at the beginning of their PGY 2 year. If a resident enters the program after their PGY 1 year they may use their educational money towards the purchase of loupes.

If an item is not on the list, the resident is responsible for submitting an “Expense Policy Exception Request Form” PRIOR to the purchase of their item. If approved, the resident may purchase and submit for reimbursement.