

NORTHWESTERN UNIVERSITY FEINBERG SCHOOL OF MEDICINE
DEPARTMENT OF SURGERY
POLICIES & PROCEDURES

Education Fund Policy

Updated April 2019

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 \$2,000 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 will receive the standard \$2,000, however \$1,000 of those funds will go towards the purchase of loupes.

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, W9, and receipts** to the program coordinator within 80 days of purchase. Any reimbursement submitted after the 80 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 and submit the expense report, W9, receipt, 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
- **Conferences and Courses-** conferences and courses can be both in person and virtual
- **Textbooks-** hard copies or electronic textbooks and medical journals
- **Examinations & Prep Courses-** resident who are required to take an exam (USMLE Step 3 included) may submit receipts for study materials and exam fees
- **License and Renewals-** resident who have licenses or renewals that 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 education money towards the purchase of loupes.
- **Rotation Travel-** residents who have rotations off-site at CDH, and Macneal may submit reimbursement travel costs.
 - **Train Travel:** attach receipt and copy of train pass
 - **Taxi or Uber:** attach copies of all receipts
 - **Personal Automobile:** residents must write down the mileage incurred to and from the rotation, each day of the rotation.
- **Interview Travel-** funds may be used to help offset the cost of fellowship interview travel (to include flights, hotel, transportation, and food).
- **Computers & Software-** computers and software may be purchased in any PGY year for educational purposes and training

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.