

PROCEDURE GME 35

Subject:
EDUCATIONAL LEAVE AND
REIMBURSEMENT PROCESS

EFFECTIVE DATE:
July 1, 2017

Applies to:
HOUSTON METHODIST HOSPITAL SYSTEM—GME

Date Revised:
July 1, 2018

Originating Area:
GRADUATE MEDICAL EDUCATION COMMITTEE

Target Review Date:
July 1, 2021

I. GENERAL STATEMENT

All Houston Methodist Residents are eligible for Educational Leave to present at professional meetings or to attend meetings of professional organizations in which the Resident occupies a position as an officer or representative in an official capacity. Houston Methodist policies and procedures concerning reimbursement for these leaves apply to all Residents. This procedure outlines the process for requesting Educational Leave and reimbursement for costs associated with attending such meetings. Each Resident is responsible for reading and complying with all pertinent GME procedures and the referenced HMH policies and procedures. This policy is adapted from HMH policy F106. *Residents should keep in mind that during their travels they are representing their Program, the GME Office, as well as Houston Methodist Hospital in its entirety. Words and actions should at all times be representative of the ICARE values that are critical to the Houston Methodist mission.*

II. GENERAL REQUIREMENTS

1. All Residents are granted five (5) working days of Educational Leave per year. Examples of Educational Leave include:
 - Presenting papers or abstracts at professional conferences/meetings
 - Presenting poster exhibits at professional conferences/meetings
 - Time off to take a licensure or board certification examination
 - Attendance at meetings of professional organizations in which residents occupy official positions as officers or representatives, appointed to committee, participating as moderator or facilitator.
2. Residents may not use Educational Leave nor receive reimbursement to present the same paper or poster more than once.
3. Educational Leave is not intended to be used for job interviews. Residents seeking time off for job interviews should use PTO.
4. Residents may not use these funds to pay for membership dues, online courses, books, medical equipment, training seminars, board review, or educational conferences at which they are not presenting or attending in an official capacity.

5. Educational Leave must be approved by the Program Director and appropriately documented on the Pre-Travel Authorization Form submitted to the GME Office.
6. Unused Educational Leave does not roll over to subsequent years.
7. Residents are eligible to receive a conference stipend, per conference, up to a maximum of two conferences per academic year, to offset associated costs such as registration, travel, meals, poster preparation, etc., as set forth below:

Educational Leave	Eligible Amount for Residents not in final year of training	Eligible Amount for Residents in final year of training
Platform/Podium Presentation	\$1,600	\$2,000
Poster Presentation	\$1,200	\$1,600
Attending in official capacity as officer/rep	\$1,000	\$1,400

8. Residents should contact their Program/Department for funds to defray costs in excess of the amounts listed above for presenting at professional conferences and meetings.
9. To be eligible for reimbursement for presenting a poster, paper or abstract, the poster, presentation or abstract must be entered into New Innovations as Scholarly Activity. The GME Office will verify the entry prior to processing the reimbursement.
10. Residents must retain detailed receipts (as explained below) to document claims for educational reimbursement.
11. Residents on research leave from their program are not eligible for reimbursement of educational leave through the GME Office. Any costs incurred for presentations, etc., while on research leave should be borne by the research grant/lab.
12. PGY2 Residents and above may also use their Educational Leave funds to pay for ACLS recertification from an American Heart Association (AHA) accredited provider, provided that the recertification occurs during their training at Houston Methodist. PGY-1 residents as well as any residents transferring in at any other level must have ACLS certification prior to joining Houston Methodist.
13. Educational Leave funds may be used for international travel with the **prior approval** of the DIO. Reimbursement will only be made for platform/podium presentations or moderated poster sessions that have not previously been presented. A poster presentation that is simply a display is not eligible for reimbursement. A resident may take no more than one international trip per year. If approved, reimbursement will be limited to the amounts set forth above. Due to visa regulations, Residents on visas are precluded from international travel under this policy.

III. GUIDELINES FOR SUBMITTING REIMBURSEMENT REQUESTS ON GME FUNDS

1. **PRIOR TO TRAVEL.** The Pre-Travel Authorization Form must be fully completed, signed and submitted to the Program for approval and on file in the GME Office prior to departure. Failure to submit the form prior to departure, may delay reimbursement.
2. **Submission Requirements.** Reimbursements for educational leave must be submitted through MARS using the online Travel and Entertainment Expense (T&E) Report Form. T&E's that do not conform to the requirements below will be returned for correction/editing.
 1. The Pre-Travel Authorization Form, mentioned above must be approved by the Program and on file in the GME Office.
 2. Pre-Travel Authorization Forms for foreign trips should be approved by the DIO prior to making travel arrangements.
 3. Only one T&E form should be submitted per trip.
 4. All sections of the T&E must be completed. Incomplete/unsigned forms will delay reimbursement.
 5. A copy of the meeting/conference agenda and documentation of acceptance of the presentation or attendance in official capacity should be provided along with the Pre-Travel Authorization Form.
 6. **A separate, legible receipt is required for each expense item. Individual receipts must be uploaded for each expense item. Missing receipts will delay reimbursement. Receipts are not to be combined onto one page and submitted. These will be returned and delay reimbursement.**
 7. **DETAILED receipts that reflect the meal items purchased along with the credit card receipt indicating gratuity must be provided. You may contact the restaurant for a copy of your receipt. Credit card statements will not be accepted.**
 8. The receipt amount must correspond to the expense item on the T&E. Please make any necessary adjustments on the receipt to ensure that the receipt amount corresponds to the expense line on the T&E.
 9. Reimbursement is limited to the traveler. Reimbursement for spouses/guests is not permitted and those costs must be removed from the expense documents prior to submission.
 10. If the T&E includes reimbursement for a previously paid, but unreimbursed registration fee, please use the date of the trip as the registration fee date to be entered on the T&E.
 11. Airfare reimbursement is limited to economy. Upgrades for seating, early boarding, etc., are not reimbursable.
 12. Itemized hotel bills must be submitted. Only amounts related to hotel room costs (including taxes) should be reported under "Hotel Room". Other costs on the itemized bill (i.e. meals, valet parking, etc.) should be broken out and reported separately with any necessary justification on the T&E form.
 13. Personal entertainment expenses, gifts, etc., are not reimbursable to the employee.
 14. The cost of meals (breakfast, lunch, dinner) while traveling out of town are reimbursable subject to the lesser of actual expenditures or \$115 per day. The daily meal per diem is provided for on the day of departure and the return day

- and will be determined based on which meals are required away from home based on the travel schedule.
15. Reimbursement will be made for up to three meals per day: breakfast, lunch or dinner. Expenses for snacks, sodas, sundries, gifts, etc., are not reimbursable.
 16. Each meal must be individually listed on the form.
 17. Alcoholic beverages are not reimbursable.
 18. If a meal is furnished to an employee as part of a meeting at no cost to the employee then no reimbursement will be paid for that meal.
 19. Group meals may be reimbursed up to a maximum of \$75.00/person. No exceptions. A list of attendees must be included in the designated areas on the T&E form.
 20. When requesting mileage reimbursement, include a Google/Yahoo map that shows the mileage being claimed. Mileage must be entered on the day incurred.
 21. Gasoline purchases are only reimbursable when renting a car, otherwise when using personal vehicle, only mileage will be reimbursed.
 22. When you use taxi, Uber or other forms of transportation, the trips must be listed by day the expense was incurred.
 23. All T&E reimbursement requests should be submitted through MARS within 45 days of return from a trip to allow for GME review. Reimbursement requests that contain expense items that are more than 75 days passed the first expense transaction date must be accompanied by an explanation for the late submission.
 24. Ensure the meeting attendance and presentation has been entered into the Scholarly Activity section of New Innovations.
 25. The GME Office may request further support and/or justification for any reimbursable costs.

Further details on allowable costs may be found in Policy Tech under HMH Policy F106.

IV. COMMITTEE REVIEWING OR APPROVING PROCEDURE:

1. Graduate Medical Education Committee [April 13, 2017] [June 14, 2018]

Attachment:

1. Resident/Fellow Pre-Travel Authorization Form

AUTHORITATIVE REFERENCES:

Accreditation Council for Graduate Medical Education Institutional Requirements for (IV.G.)
Houston Methodist Hospital Policy F106.