POLICY: House Staff Educational Allowance

Purpose:

NYU Winthrop Hospital provides an annual educational allowance for all members of the house staff. The allowance is intended to defray educational costs that house staff may incur for various educational activities, services or products that they deem beneficial and complementary to their graduate medical education training. The amount of the educational allowance is based on the post-graduate level as follows:

- Program Level 1 $ 75
- Program Level 2 and above $700 plus five (5) paid conference days

Procedure:

- Eligible Uses. House Staff may utilize the educational allowance toward the following educational activities, products or services:
  - Educational conferences, courses and meeting registration fees and related travel expenses
  - Educational equipment, lap tops, smart phones, other devices, and other technology
  - Educational services, including educational dues and subscriptions, online course fees, software, and other types of supportive and complimentary services

- Approval. The use of the educational allowance and subsequent reimbursement is subject to the prior written approval of the program director and/or clinical department chair.

- Tracking. The educational allowance will be tracked and managed locally by each department. Annual expenditures and balances will be maintained by the Academic Coordinator for the residency or fellowship program using the Resident Request for Educational Funds log form. The full allowance must be spent before June 30 of each academic year. Unused balances may not be accrued to the next academic year.

- Purchasing/Reimbursement. Once approved, House Staff may utilize the allowance for direct purchase of educational activities, services or products from the vendor of their choice.
o **Conference Travel Expenses, Books, Educational Software, Course Fees & Subscriptions**: For all expenses other than educational equipment (see below), the House Staff member must present a vendor receipt(s) of payment to the department for reimbursement by the hospital. The Academic Coordinator must complete a Request for Check form or Travel Reimbursement Application and Payment form for reimbursement of incurred expenses. Supporting documentation showing how the house staff member incurred each expense must be provided for all amounts requested for reimbursement. All such requests for reimbursement above are subject to review and approval by the authorized chair and department administrator. The House Staff member will receive a check as reimbursement.

o **Educational Equipment.** If the House Staff member uses the allowance to purchase educational equipment (e.g. laptop, smart-phone, i-Pad, or other electronic device) the amount of the reimbursement must be reported to the IRS as additional income. For these types of purchases, the department Academic Coordinator must complete a Personnel Change Authorization (PCA), signed by the Director of GME, indicating the House Staff member is being reimbursed under the Educational Allowance Policy, and attach all supporting documentation to the PCA. The PCA with documentation is then forwarded to Internal Audit for final review before being submitted to Payroll for processing. The Request For Check form is not to be used for this type of purchase. The House Staff member will receive reimbursement directly via the payroll process.

**Submission Deadline:**

Submissions for reimbursement must be received by

- May 1 for residents/fellows ending their training at NYU Winthrop Hospital
- June 1 for continuing residents/fellows

Reviewed and Approved: 6/6/16
Minor modification: 10-25-2017