

STATEMENT OF GENERAL POLICY

The Personal Development (PD) fund system was established to ensure access to educational resources which will contribute to practice-based learning and function. Funds will be made available to all Residents/Fellows, to be used in a manner consistent with this policy to maximize benefit for the trainee.

PURPOSE:

To establish guidelines and define available reimbursement for individual Resident/Fellow expense items regarding the use of the Resident/Fellow PD Funds.

POLICY:

All reimbursable expenses must comply with the established organization and Graduate Medical Education (GME) guidelines and regulations. Funds will be made available to all Residents/Fellows at the beginning of their academic year. Receipts that fail to document acceptable expenses may be refused. Original receipts will not be returned.

Resident/Fellow funds do not roll over from contract year to contract year.

GME reserves the right, in its sole discretion, to deny reimbursement for any unreasonable expenses or any expenses lacking sufficient justification or documentation.

Arnot Ogden Medical Center is a tax-exempt organization; sales tax will not be reimbursed on items purchased personally by the residents/fellow. All purchases must be made through the GME office or the accounts payable department by submitting the approved PD fund request form and description of the item(s) requested for purchase. Rare exceptions may be made if the departments cannot purchase the item(s) requested, please reference the reimbursement process below.

PD Fund Allotments:

- PGY-1: \$935 or cost of Step 3 exam registration.
- PGY-2,3: \$1,125
- PGY-4,5,6: \$1,500
- Final Year of Training: \$1,000 additional (designated for board exam registration or preparation tools or fellowship application costs only)
- Diagnostic Radiology will receive \$2,800 in their PGY-4 instead of the additional \$1,000 in their final year of training to cover the cost of their board exam.

Allowable Education Expenses:

- Regional and national academic conferences (only if Resident/Fellow is not presenting): registration, airfare, mileage, car rental, lodging, and meals
- USMLE/COMLEX Registration Fees
- State license fees and DEA registration (only for use in the capacity as an Arnot resident)
- Residency/Fellowship application and associated costs (travel, lodging, food)
- Medical books, medical journals, apps, and online journal subscriptions
- Professional medical society dues or fees that enhance Resident/Fellow education
- Medical equipment like surgical loupes, stethoscopes, indirect ophthalmoscopes and lenses and other similar medical items
- Board review tools
- Away Elective Rotations: airfare, mileage, car rental, lodging, and daily allotted meal stipend
- Scrubs, uniform/white coats, and alterations

Electronic equipment & supplies:

*** Only one item of each 'large' category (tablets, monitors, etc.) allowed per each 3 years of training ***

- Tablets (iPad or Android-based) and associated accessories (cabling, covers, etc.)
- Monitors up to 32" for the purpose of attaching work laptop to assist with documentation, and associated accessories (docking station/port replicator, cabling, etc.)
- Keyboards, Mice, etc., for the purpose of attaching to a work laptop to assist with documentation
- Dictation microphones

Non-Allowable Education Expenses:

- State license fees/DEA registration (when used for moonlighting or future employment)
- Electronic Equipment: Laptops, Printers, or other items not found to be critical for education or work functions
- Furniture
- Home or other appliances (including lighting, air conditioners, etc.)
- Alcoholic beverages
- Personal entertainment expenses (including cover charges)
- Travel expenses for spouses and other dependents
- Loss or damage to personal property and Arnot owned devices.
- All reservation and cancellation charges

- Clothing/Apparel (other than above) and shoes
- Other: Gifts, laundry, and dry-cleaning expenses

SPECIFIC PROCESS FOR ELECTRONIC EQUIPMENT:

In order to take advantage of organizational pricing, and general GME oversight, all electronic equipment purchases over \$50 will be facilitated through the GME office and purchased only at Best Buy. Any equipment over \$50 purchased directly by the trainee without prior authorization from any vendor will be denied reimbursement. Any warranty or service concerns on these purchases will be through Best Buy and not the institution. The price will be based on the NY state tax rate.

1. The trainee should pick out the item(s) desired on www.bestbuy.com and submit to the GME office by e-mail: gme@arnothealth.org
 - a. Item Description (including color or any other options)
 - b. Model Number
 - c. SKU Number
 - d. Retail Price
2. The GME office will decide approval and work with the vendor to identify if the item is available through the organizational arrangement.
3. Deduction from the trainee's PD fund will occur directly without need for further forms.

REIMBURSEMENT PROCESS:

1. All receipts must show the name of the location, date, time, proof of payment, item purchased and amount of payment. It is critical to **provide itemized receipts** to allow review for appropriateness.
2. All expenses must be verified with an original receipt, which can include a scan or photo of the receipt.
3. Provide justification for expenses (no abbreviations).
4. If expenses include other participants, please include the names of those involved.
5. Do not use a highlighter or place tape on the ink since it will erase the ink.
6. For Conferences, you must provide proof of attendance and justification.
7. Credit Card/Bank statements are not allowed as a replacement for the receipt, only as a back-up for proof of payment along with purchase receipt.
8. Please work with your program coordinator or the GME office to complete the appropriate reimbursement form and submit all receipts and documentation.
9. All reimbursement requests should be completed by the last business day of the month of purchase.
10. Anticipate 60 days for processing the reimbursement.