

# South Pointe GME and Brentwood Foundation Travel/Grant Policy

## South Pointe Resident Privileges and Travel

South Pointe Hospital (Cleveland Clinic Foundation) strongly encourages their clinical trainees (residents and fellows) to participate in scholarly/research activities; these activities are mandatory in many training programs that are not required by the individual program basic standards (as defined by the AOA Basic Documents and program specific Basic Documents). The Brentwood Foundation (aka Brentwood Grant), with the recommendation of the Graduate Medical Education Council (GMEC), has set aside funds to allow trainees in accredited programs at an OGME 2 level and above to attend academic meetings, outside of the individual's basic standards, for the purpose of educational enrichment, presenting or engaging in leadership roles within national societies and or research projects.

- Eligibility for individual trips will be determined by the Program Director and the Director of Osteopathic Medical Education after reviewing the meeting for educational value and the presentation for content. In addition, if the proposal is for a poster presentation or any type of publication, the trainee must be listed as first author on the poster or presenter and be the "presenter".
- Trainees who meet the above criteria will qualify for one annual Brentwood Foundation Grant sponsored trip with a **maximum reimbursement of \$1200.00**.
- Trainees may be eligible for additional Brentwood Grant funding pending approval from the Grant Review Advisory Committee (GRAC).
- Trainees are eligible to submit funding requests for board review or equivalent courses during their final year of residency.

Requests for meeting attendance and all required pre-travel forms must be submitted to the office of GME **no later than 60 days prior to travel date** to allow for proper processing. Complete the Resident's/Fellow's Application for Meeting Attendance form FIRST, have the Program Director sign it, attach a copy of the meeting brochure or online meeting information, turn it in to the Grants Coordinator in GME and receive instructions regarding flight reservations, hotel reservations, etc. Resident.Fellow Meeting Form.doc

- A copy of the abstract and the acceptance letter, if applicable, must be attached to the meeting request form. Late requests will not be honored.
- Upon completion of travel, the resident is required to submit the following information that is necessary for reimbursement. The trainee must submit original receipts for reimbursement, documents required by the Program Director, verification of meeting attendance, and submit quality outcomes to GME office (e.g. Program specific requirements can be listed as addendums and follow the guidelines set forth using recommendations from the Program Directors and the GMEC discussions.)

## How Do I arrange my Flight?

CCF Policy states that all business travelers are required to use the designated on-site agency (American Express). Please contact AMEX at 216-444-2564 to book air travel after your meeting request form has been signed by all required persons. **Do not book your flight yourself** – if you do, you will not be reimbursed until you return from your trip and you may pay more than necessary. If a traveler finds a lower fare than quoted, contact Debbie at AMEX – 216-444-9821.

Note: Expense reports should be completed in a timely manner and ALL receipts must be included. **Expenses must be finalized and submitted within 14 days of completion of travel.** There are some Cleveland Clinic restrictions on expenses – both allowable expenses and unallowable expenses are listed in the Cleveland Clinic travel policy on the Intranet under Institutes/Departments – Travel. Be aware that the IRS standard mileage rate is now \$.55.5 per mile and subject to change and that Travel Per Diems have been replaced by Hotel Limits (these can be located on the Intranet Travel site).

Additional meeting time may be granted during the year at the Program Director's and Director of Osteopathic Medical Education's discretion. The expenses for additional approved meetings will be paid for by the trainee. Please refer to department policies and procedures for further information.

GME sponsored travel is a privilege, not a right. Residents and Fellows are expected to be good stewards of the institution's resources and to treat funds as if they were personal resources.

### **Responsibility:**

Each resident has stewardship responsibility for managing travel expenses, but in particular:

- All residents are responsible for reading, understanding and complying with this policy and any additional related guidelines established by the Graduate Medical Education Department. Any resident submitting expenses for reimbursement is responsible for the accuracy and legitimacy of those expenses.
- The approvers (Graduate Medical Education Department/management) are responsible for reviewing all expense reports for accuracy and enforcing compliance to policy. The person authorizing the expense claim is responsible for checking the accurate completion of the expense claim form, ensuring that the explanation of expenses is correct, that the documentation includes business purpose, invoices, receipts, and that the expense reimbursement guidelines have been adhered to by the employee. The invoice/expense report approver is held accountable to ensure that the policy is enforced.
- South Pointe Graduate Medical Education Committee is responsible for establishment, maintenance, revision and publication of this policy.

### **Enforcement:**

South Pointe will reimburse residents **up to \$1200 annually** (in accordance with the Brentwood Grant) for all reasonable and necessary expenses incurred while traveling that is in compliance with the guidelines of the Graduate Medical Education Department.

- South Pointe Hospital assumes no obligation to reimburse residents for expenses that are not in compliance with this policy. Abuse of this expense policy, including falsifying expense reports to reflect costs not incurred by the resident or falsifying business purpose or expense types could result in corrective action up to and including termination of employment.
- Travelers and/or expense claim approvers who do not comply with this policy may be subject to delay or withholding of reimbursement and/or disciplinary action up to and including termination of employment.
- Any charges (personal or business) that fall **past due more than 14 days** after returning from a trip may result in delayed or denied reimbursement.

### **Travel Authorization:**

Obtaining Travel Authorization (Application for Meeting Attendance) Resident.Fellow Meeting Form.doc  
All Resident Travel Authorization

- It is to be understood that all residents are required to receive approval from the Program Director and the Director of Osteopathic Graduate Medical Education (or designee/approver) to proceed with travel plans.
- Note: All managers and directors reserve the right to deny expense reimbursement for unapproved travel.

### **Travel Approval:**

1. Residents are responsible for obtaining approval for all travel **BEFORE** making any travel arrangements. All travel must be approved by the Program Director.
2. South Pointe reserves the right to deduct unapproved/unauthorized expenses from the employee's pay.
3. South Pointe business requires clear and complete documentation of the reasons for the travel.
4. The traveler/approver is to provide justification for the business travel and describe the benefits to be derived by South Pointe and the Brentwood Foundation. In deciding upon the appropriateness of any business travel, the approver should determine that the application falls within the definition of official South Pointe business as discussed in the policy statement and should evaluate its appropriateness in light of the following:

- The personal and professional development of the resident and impact of such upon the performance of his/her duties.
- The nature of the program and its applicability to the resident.
- The nature of the program participation and the direct benefit to South Pointe and/or the Brentwood Foundation resulting from the employee's participation.
- The cost effectiveness aspect of alternative travel locations (meeting sites and programs), i.e. is the same program offered at another closer location than the one requested?
- The length of time business travel takes place and number of days away.
- The total estimated cost of the program in relationship to the anticipated benefits to be derived.

#### **Changes to a Travel Itinerary Prior to Departure:**

It is the traveler's responsibility to inform all appropriate individuals in the event that changes to the itinerary are necessary to previously authorized travel prior to departure.

#### **Registration Fee:**

Payment of registration fees can be made using one of the following options:

1. Resident pays the registration fee using a personal credit card or check and submits a receipt for reimbursement along with all other expenses incurred for the trip after the trip is completed.
2. Using the "TRAVEL REGISTRATION PAYMENT REQUEST" form the resident can request a payment directly to the organization for the cost of registration using these directions: Copy of Travel Registration Payment Form.xls

Prepare the form for payment to the organization holding the conference, seminar, training, etc. following all instructions listed on the form. Attach one copy of the completed registration forms(s) (provided by the organization holding conference) to the BACK of the form. Fold and attach ANOTHER copy of completed registration forms(s) to the front of the form. The amount of the registration must be included on the Travel Expense Report after completion of trip. **Allow at least six (6) weeks prior to the date of the conference for this method of payment from time received in GME.**

Note: **LATE** registration payment requests **WILL NOT** be accepted.

#### **Local Travel:**

Local meetings are those defined as being held within a distance not requiring an overnight stay.

#### **Approval:**

Local travel requires prior authorization at the Department or Institute level. (Follow Travel Authorization process).

#### **Local Meetings Reimbursement Limits:**

Meals are not a reimbursable expense for local meetings. Residents should follow the mileage reimbursement policy for personal care usage. (see Mileage Reimbursement policy section on the Intranet).

#### **Alternatives to Travel:**

E-Meetings, teleconferencing and video-conferencing are effective alternatives to travel and represent an opportunity to significantly reduce travel costs. Prior to making travel arrangements, resident should first consider if a telephone conference call could satisfy the objectives of an off-site meeting. Videoconferencing and web-based conferencing are also popular alternatives to travel and represent an opportunity to control travel costs, as well as support environmentally friendly reductions in carbon emissions. The Cleveland Clinic currently has videoconferencing capabilities between its offices worldwide in many locations. Please refer to this Intranet site – <http://intranet.ccf.org/media> - for more information.

**Video Conferencing:**

This is using a video conference unit set up in several equipped conference rooms across Cleveland Clinic facilities that allow a two-way interactive session with live video and audio communication between sites. This method can be used to hold live sessions between two locations with as many people as needed, where people can see and talk with each other as opposed to a face-to-face meeting. This service can be scheduled through media services in combination with a scheduled room with video conferencing capability.

**Allowable Travel Related Expense:**

The following incidental expense will be reimbursed up to \$30 per day, when directly related to business travel, provided they are appropriate in the country incurred, are identified separately and are supported by original receipts:

- No more than two (2) checked-in luggage will be reimbursed
- Airport taxes/fees
- Refueling of gasoline for rented vehicles
- Parking and tolls
- Taxis and sedan charges

**Non-Reimbursable Expenses:**

The following is a list of expenses, although not all-inclusive, that are NOT reimbursable:

Airline mileage, reward or club membership fees/dues

Air, rail, care rental phone usage, unless for emergency purposes

Annual dues on a personal credit card

Barber/hairstylist expenses

Bridal, baby shower, birthday, anniversary, congratulatory and wedding gifts and/or flowers

Car washes

Cell phone accessories (i.e., car chargers, ear buds, wireless headsets, memory cards, ring tones)

Clothing purchases and formal attire rental

Club memberships or fees

Credit card rewards plans/membership fees

Decorations

Dependent care

Donations, including monetary gifts sent in lieu of sympathy or congratulatory flowers

Excess baggage charges for personal items

Expenses related to vacation or personal days while on a business trip for employee or travel companion

Golf and other recreational fees, if not part of a customer business entertainment event

Hardware, software and telecom (cell phone) equipment purchases other than as authorized by Cleveland Clinic

House-sitting fees

Hotel room movies and in-flight movies

Job boards (all job boards should be obtained through the corporate preferred supplier) and processed through Accounts Payable

Kennel fees/Doggie Day Care

Late fees for cellular phones, home phones, internet services, etc.

Late payment and delinquency charges

Laundry, dry cleaning and valet services for trips less than 7 consecutive days in length

Lost case

Lost personal items and valuables

Lost tickets

Loyalty or rewards programs membership fees

Luggage, briefcases

Medical bills incurred during domestic travel

Movies, theatre and rental

No-show/cancellation charges

Optional travel or baggage insurance

Passport

Personal articles (toiletries, magazines, other reading materials)  
Personal accident insurance  
Personal entertainment  
Postage and postcards that are not business related  
Registered traveler program fees  
Routine car maintenance  
Shoe shine, shoe repair  
Snow removal, lawn care or any other home maintenance charges  
Social activities that involve other employees (celebrations or wedding or other personal events, birthdays, farewell parties, etc.)  
Souvenirs, personal gifts  
Spa services, including beauty treatments and sauna  
Supplementary personal life insurance or other insurance premiums  
Tobacco products  
Traffic and parking fines  
Upgrades for air, hotel or car rental

**Policy Effective Date and Review**

Effective date of this policy is May 1, 2011.

This policy will be reviewed annually or as required, in order to ensure that the terms are current, fair and representative of relevant corporate and industry conditions. Printed copies of this document are uncontrolled and this may not be the latest version.

South Pointe reserves the right to change this policy at any time, without prior notice.