

Western Nephrology Trainees

Policy & Procedures for Education/Travel Allowance

Revised: October 28, 2024

Reviewed by Residency Program Committee: Dec 19, 2023

Next Review Date: December 2026

Claims must be submitted to Nephrology within one month of attendance at a conference/course.

When you join the program please ensure you have completed an EFT form and returned to Anne Marie Dyson, or there will be delays on your first claim.

If a claim is submitted without the claim form or with incorrect or missing receipts it will not be processed and will be returned.

Receipt requirements are on Page 2 and the Claim Form is on Page 3.

Each Nephrology trainee (PGY 4-5) is permitted up to \$2,000 for each academic year, \$1,400 from Nephrology and \$600 to be claimed through the Department of Medicine. PGY4 & 5's who are not MOH funded may be eligible to receive the full \$2,000 from Nephrology, if there are no other means of funding from their sponsoring authority.

Any remaining funds from the PGY 4 year will carry-over into the PGY 5 year. All claims must be submitted by the end of the PGY5 year, there will be no further funding or carry-over beyond that date.

This funding can be claimed up to the maximum amount above, to use for educational activities during PGY4-5 years with the Division of Nephrology. These funds are not allocated to each trainee personally but are held in an account which allows claims for legitimate educational receipts only. These funds rely annually on fundraising; therefore, any unused funds will remain in the account to support the education the activities of future trainees.

Guidelines for Department of Medicine claims are on Page 4.

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Procedures – Claims to Nephrology

Trainees are expected to book hotels and pay conference fees early to avoid late penalties.

Conference/course claims must be received within one month of attendance and please ensure that you have received approval from the Program Director.

Eligible Expenses:	Not Eligible:
<ul style="list-style-type: none">○ Conference Registration.○ Accommodation while attending the conference.○ Airline/Bus/Train – Economy Fares Only.○ Car Rental - only if primary mode of transportation.○ Mileage and Parking – use of personal car – no gas receipts.○ Course fees including on-line courses with pre-approval.○ UpToDate Subscription (PGY4-2 years/PGY5- 1 year)	<ul style="list-style-type: none">○ Food & Beverages.○ Entertainment.○ Personal expenses.○ Elective expenses.○ Exam/interview expenses.○ Generic Software.○ Computer Hardware/Phone.

Applying for Reimbursement – if receipts or claim form is missing, the claim will be returned

Complete the claim form (Page 3) and submit all receipts to Anne Marie Dyson, at University Hospital including the following:

- A copy of a certificate of attendance or agenda is mandatory.
- Electronic receipts are accepted but must contain a credit card confirmed payment.
- Any original receipt i.e. cabs/parking, must be original – scanned copies will not be accepted.
- Foreign currency receipts must be indicated on the form and include copies of credit card statement with the exchange rate. A currency exchange receipt is required for cash payments.
- Boarding passes for flights/trains are mandatory, electronic passes are accepted.
- Accommodation receipts must show paid in full. If the accommodation booking is an internet receipt only, then a copy of the credit card statement must be provided.
- If accommodation is shared all trainees claiming a portion of the cost must include:
 - A copy of the paid receipt.
 - A copy of the e-transfer used to reimburse the other trainee.
 - An acknowledgement that the funds were received by the trainee owed.
 - The trainee paying the full cost must list all reimbursements received.

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Claim Form – Nephrology

Name of Trainee:	
Dates of Attendance:	
Conference/Course Name:	
Location (city and country):	
Approved by the Program Director:	Yes/No

Date	Expense	Details	US \$	CDN \$
	Accommodation			
	Conference or Course Registration			
	Flights			
	Bus/Train			
	Mileage/Parking			
	Cabs			
	Other			
		TOTALS:		

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Procedures – Claims to Department of Medicine

You are responsible for submitting your expenses for Department of Medicine claims on-line.

When you began your residency, you would have received an email (uwo account) asking you to set up an account for an associated person's status with Western Financials. If you did not receive the email, please check your junk/spam folder for it. Once you have completed the required registration, it can take 1 to 2 days for your account to be set up. Once the account has been set up you will be able to log in to Western Financials and create/submit your expense claim.

Eligible Expenses:	Not Eligible:
<ul style="list-style-type: none">○ Airline/bus/train tickets.○ Car rental.○ Mileage.○ Accommodation costs while attending the conference.○ Tuition fees for an educational course○ Registration fees for a conference.○ Educational manuals & computer software	<ul style="list-style-type: none">○ Food.○ Beverages.○ Entertainment.○ Electives.○ Exam Fees.○ Medical Equipment (e.g. stethoscopes)○ Travel to Exam or interview.○ Generic software.○ Computer Hardware.○ Shared Receipts.

Applying for Reimbursement and Important Information:

When completing the Travel Expense Report please include the following:	<ul style="list-style-type: none">● Course or conference name, date(s) and location● Agenda or itinerary for the conference● Airline/bus/train tickets (include boarding pass)● Car rental invoice & receipt● Hotel invoice & receipt ● Original receipts in your name are required
Submission	Please submit all expense claims online through Western Financials: https://finance.uwo.ca/
Instructions	 DoM Resident Online Expense Claim Instruc
Questions?	Any questions related to eligibility of expenses should be sent to: domexpenses@lhsc.on.ca

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Each trainee (PGY 4-5) will be eligible for an annual Education/Travel Allowance not to exceed \$600 per annum.

- Any balance from the PGY4 year will be credited to the next year.
- Claims must be received within one month of attendance.
- Credit card statements or sales slips will not be accepted as receipts.
- The academic year is defined as the 12-month period July 1 – June 30.
- Funding does not carry-over, claims must be submitted before the end of your PGY5 year.