



SCHOOL OF MEDICINE

Department of Anesthesiology

UNIVERSITY OF COLORADO ANSCHUTZ MEDICAL CAMPUS

POLICY: T&E Funds – Overview, Accrual & Usage

Updated November 16, 2017

PURPOSE

The following policy outlines the terms of T&E Accrual and Usage. This policy was updated November 16, 2017, is based on CU Medicine and IRS Policies, and is subject to change at the discretion of the Department Chair.

SCOPE/PERSONNEL

All Clinical Faculty members in the University of Colorado School of Medicine Department of Anesthesiology

PROCEDURE/POLICY

Overview

T&E is assigned to each clinical faculty member based on Department Finances and approved Hospital Support budgets. Physician faculty, as full members, will receive an annual full share disbursement equivalent to their FTE. Advanced Practice Provider (APP) faculty, as affiliate members, will receive half a share. Upon hire, you will receive a startup balance of \$500. Physician faculty also have the option to contribute a portion of their Chair's Discretionary Incentive and call payments to T&E annually and monthly, respectively (UPI Incentive Reserve Form & UOC Incentive Reserve Form). T&E funds may be accumulated ("carried forward") for the duration of employment. However, as T&E funds are considered an investment in the future rather than a reward for past activity, practice members that separate from the department (regardless of the reason) forfeit their access to any T&E funds by their effective date of separation. Remaining T&E funds cannot be paid out upon departure.

The existing T&E policy and appropriate uses for funds are outlined here:

- T&E funds are to be used for mission-related expenses that benefit the department, such as travel to work-related conferences, memberships/licenses and/or educational materials related specifically to one's role in the Department.
- Items purchased with T&E funds are considered department property.
 - The department may ask for you to return all items purchased with T&E Funds at any time, or prior to departure.
 - For that reason, T&E funds are not able to be used for personal items (e.g. OR shoes, stethoscopes, thyroid collars, etc.)

Viewing Your Balance

You can view your T&E balance and transactions by going to the department intranet page, and under the faculty section click on "T&E Balance." Login and you will be able to see your balance.

T&E Funds Usage: Travel

T&E approved travel is limited to Anesthesia-related conferences that are relevant to your role in the Department. T&E related travel is subject to department and Chair approval prior to the purchase of travel-related expenses. Travel on T&E Funds is subject to CU Medicine Travel Policies which are outlined below (the full version can be found [here](#)).

Air Travel

Purchased flights should be the least costly direct air route, and should be at the economy rate. Upgrades are allowable at the expense of the traveler and cannot be reimbursed.

Transportation

Employees are expected to use the most economical and efficient mode of transportation available.

Lodging

Lodging expenses will be allowed for individuals when they are on company business at a distance from their usual place of work where commuting would be impossible, impractical, or not cost effective. The lodging reimbursement is limited to a reasonable standard, single room or commercial rate plus taxes and surcharges.

If the individual occupies the room with his/her spouse or other non-CU Medicine persons at a double or higher rate, CU Medicine will reimburse the traveler for the single room rate only.

Reimbursement is only permitted for the duration of a conference, plus a travel day on either end.

Meals & Incidentals

Reimbursable meals must be purchased as a result of travel or must be related to the active conduct of business. Meals are reimbursable at actual cost provided the allowable limits listed below are not exceeded. As standard CU Medicine policy, meals and entertainment are limited to the following:

- Breakfast - less than or equal to \$20 / person
- Lunch - less than or equal to \$30 / person
- Dinner - less than or equal to \$80 / person

Itemized receipts must be provided for each meal for which reimbursement is being requested.

IT / Educational Materials Purchases

For purchases that do not meet the standards for Department Funding, use of T&E funds can be requested. Purchases are subject to approval. Items must be related to work done for the Department of Anesthesiology and your role within the department. Any items purchased belong to the Department, and the Department can request the return of items at any time.

- Per IRS rules, faculty cannot buy out any items purchased on T&E at any time. This includes laptop computers and iPads.
- As mentioned above, T&E cannot be used for the purchase of personal items, even those related to business (e.g. cell phones, phone contracts, or cell phone accessories).

Memberships:

See below for a list of Department-Paid Memberships. All other Anesthesia-related memberships and licenses are able to be considered for T&E Reimbursement, provided that approval is sought prior to purchase.

Physicians

- ASA/CSA - American Society of Anesthesiologists/Colorado State Society of Anesthesiologists (Combined membership payment paid annually as group)

- SAAA - Society of Academic Anesthesiology Associations. Fee paid for a small group of physicians that attend the conference each year (usually four providers)
- CMS - Colorado Medical Society
 - Only upon approved request by Chair
- DMS - Denver Medical Society
 - Only upon approved request by Chair
- DEA
 - Fee exempt for UCD employees
 - The department does not reimburse for private DEA licenses
- Pediatric Privileges at CHCO
 - initial applicant fee
 - renewal fee every two years
 - Only for faculty that work Peds calls

APPs

CRNAs

- AANA/COANA - American Association of Nurse Anesthetists (Combined membership payment paid annually as group)

AAs

- AAAA - American Academy of Anesthesiologist Assistants
- CAAA - Colorado Academy of Anesthesiologist Assistants

PAs

- ASRA – American Society of Regional Anesthesia and Pain Medicine
- AAPA – American Academy of Physician Assistants

NPs

- ASPMN – American Society for Pain Management Nursing
- APS – American Pain Society

Pre-Procedure Nurses

- ANA – American Nurses Association
- AANP – American Academy of Nurse Practitioners

Cross-Provider

- ACLS/BLS/PALS
 - Department will provide some in-house trainings. Otherwise, this is provider-paid. Physicians at UCH are not required to obtain ACLS/BLS/BALS licensure. If working at CHCO, these licenses are required.
 - ACLS (advanced cardiovascular life support)
 - \$115 - \$150 for course and optional materials
 - BLS (basic life support)
 - \$22 online, often the BLS is combined with the ACLS
 - PALS (pediatric advanced life support)
 - Peds faculty and RMLEI faculty required to recertify every two years.
 - \$200 per course

Please also be aware that donations to Medical Societies are not reimbursable via T&E.

T&E Funds Usage: Faculty Departure

In order to use remaining Travel and Education (T&E) balances, Faculty should provide at least six-months' notice of resignation prior to their last day with the Department. If a faculty member needs to provide less than six months' notice, any remaining funds will be returned to the department. It should also be noted that any items (IT included) purchased via T&E belong to the Department, and will be collected upon departure.

- Reserve dollars cannot be paid out as an incentive
- Any residual T&E funds are forfeited at the time of departure

*** Please note that this policy is not exhaustive. Should you wish to pay for or reimburse any item via T&E funds, please seek approval prior to purchase ***