

FY2015-16 POSTGRADUATE MEDICAL EDUCATION FUNDING GUIDELINES

Purpose

The FY2015-16 Postgraduate Medical Education Funding Guidelines are intended to provide guidance and clarification on PGME funding distribution, eligibility of expenditures and how to exercise care and moderation in the use of PGME funds.

Funding Guidelines

In principle, PGME programs follow UBC and the Faculty of Medicine policies and regulations in spending.

1. Resident Activity Funds

The funds are based on the Postgraduate Medical Education funding formula which specifies the number of residents and the per resident rate of payment. For fiscal year 2015-16, the Resident Activity Funds are \$1,800 per resident (sponsored residents are NOT included).

We are required to allocate and spend based on the fiscal year and as the result, total available funds are based on 2 calculations. Programs are eligible for 3 months of funding for the period April to June 2015 based on the number of residents in your program for July 2014-June 2015 academic year (\$450 per resident) and 9 months of funding for the period July 2015 to March 2016 based on the number of residents in your program for July 2015-June 2016 academic year (\$1,350 per resident) for a total of \$1,800 per resident for the fiscal year.

The funds are to be spent on providing academic and educational materials for the residents. Books, computers and software for the resident library, courses and sending the residents to educational events are eligible expenses. All expenses must be reasonable and support the educational mandate of the PGME programs. Excessive expenses are not allowed.

The funds can also be used to sponsor team-building activities bundled with academic education such as resident retreat/event. Such activities should be moderate, and within the UBC per diem rate (please refer to UBC Policy# 83 - <http://universitycounsel.ubc.ca/files/2013/04/policy83.pdf>)

PGME office will provide a budget template for the resident retreats/events; all expenses must be budgeted and pre-approved by the Department Head and the cluster Associate Director, Finance. For departmental events involving the Department Head, the budget should be pre-approved by the Dean.

PGY 1

For programs having a general clinical year, **\$1,000** per resident will be allocated from your total sum to the PGY1 training site. These funds will be forwarded to the PGY1 sites by the Postgrad Dean's office with the funding adjustment reflected on the program's budget template.

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2. Program Director Stipend

For fiscal year 2015-16 program allocations will be based on the following formula: (sponsored residents are NOT included)

# of Residents	Amount (\$)
0	5,000
1-4	30,000
5-9	30,000
10-14	37,500
15-19	45,000
20-24	60,000
25-29	67,500
30-49	75,000
50-74	105,000
75-99	135,000
100-124	165,000
125-149	195,000
150-174	225,000

**starting FY2015-16, \$5,000/annum Program Director stipends will be provided for active program without resident*

Each Department Head is responsible for disbursement of the funds to the program directors, either as a direct payment, or as a direct component of a Full-Time Faculty stipend (a buy-out or reimbursement to the department). **All program directors must have a current appointment letter co-signed by the Department Head and the Postgrad Associate Dean, which includes his/her remuneration and the method of payment etc.**

There are no restrictions related to the type of faculty appointment a program director has; they may be full-time faculty, part-time faculty, Clinical Faculty, or partner appointees. Those on Alternative Payment Programs are eligible provided their existing contract DOES NOT include administrative work.

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3. Secretarial and Administrative Support

The funds are based on the Postgraduate Medical Education funding formula which specifies for fiscal year 2015-16 that the rate of payment is \$65,000 per FTE. Program allocations will be based on the following formula: (sponsored residents are NOT included)

# of Residents	FTE
	\$65,000
1-4	0.30
5-9	0.50
10-14	0.80
15-19	1.00
20-24	1.40
25-29	1.80
30-49	2.00
50-74	2.50
75-99	3.00
100-124	3.50
125-149	4.00
150-174	4.50

Each Department Head is responsible for disbursement of the funds so that the program directors receive appropriate secretarial/admin support for the programs. The funds can ONLY be spent on personnel and office operating expenses associated with the PGME program.

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4. (A) Formal Scheduled Teaching (Without Patient Care)

The allocation of these funds for the delivery of the academic component (academic half or full days) is based on the postgraduate medical education funding formula below. Eligible Clinical Faculty will be paid in accordance with the Clinical Faculty Compensation Terms for Teaching in the MD Undergraduate and Postgraduate Programs, currently of \$90/unit (hour).

Funds will be placed into an account named for each eligible division/department:
(sponsored residents are NOT included)

# of Residents	Hours per year
1-9	300
10-19	350
20-29	400
30-39	450
40-49	500
50-59	550
60-69	600
70-79	650
80-89	700
90-99	800
100-109	1000
110-119	1100
120-129	1200
130-139	1300
140-149	1400
150-159	1500
Family Practice	3000

A small portion of the funds (up to 10%) can be used to cover direct expenses (i.e. fees, honoraria etc.) for guest speakers at academic half or full days.

The departments are required to provide a list of physicians, eligibility of payment and topics of didactic teaching activities for the purpose of budgeting and financial reporting of Didactic Teaching Funds.

(B) Teaching Combined With Patient Care

Payment (recognition) for Teaching Combined with Patient Care is allocated on the principle that the funding will “follow the resident”.

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Rotations are tracked through One45 and funding is allocated based on eligible rotations. Funding will be distributed following the full review of One45 data in fall 2015. The Departmental Clinical Teaching Support Allocation and Accountability (CTSA&A) Committees will be responsible for overseeing the payment of their Clinical Faculty based on this information.

In general, full time faculty members, salaried Clinical Faculty with health authorities, or Clinical Faculty under CSC or Alternative Payment Program arrangements are not eligible for Teaching Combined with Patient Care Payments, except rare cases which have been carefully reviewed and agreed that the current salary arrangement doesn't cover the Postgrad teaching services.

The programs are responsible to determine the eligibility of Clinical Faculty for Teaching Combined with Patient Care payments. Unspent funds will be clawed back after the fiscal year end. Eligibility for payment is governed by [University of British Columbia, Faculty of Medicine Clinical Faculty Compensation Terms for Teaching in the MD Undergraduate and Postgraduate Programs](#).

5. Site Directors – Vancouver Coastal Health/Provincial Health Services Authorities/Providence Health Care

Funding is provided for Site Directors within Vancouver Coastal Health/Provincial Health Services Authorities/Providence Health Care for our Foundational Programs, where the “pre-expansion” sites do not have Discipline Specific Site Leaders (DSSL). This funding is intended to provide support to the Site Directors in the absence of DSSL funding. Funding to the programs is based on the number of residents in the program with site directors funded at the per Unit rate of \$5,000 per the following formula:

# Residents per Program	Unit	Amount
1 - 10	1.00	\$5,000
11 - 20	1.50	\$7,500
21 - 30	2.00	\$10,000
31 - 40	2.50	\$12,500
41 - 50	3.00	\$15,000
51 - 60	3.50	\$17,500
61 - 70	4.00	\$20,000
71 - 80	4.50	\$22,500
81 - 90	5.00	\$25,000
91-100	5.50	\$27,500
101 - 110	6.00	\$30,000
111-120	6.50	\$32,500
121-130	7.00	\$35,000
131-140	7.50	\$37,500
141-150	8.00	\$40,000
151-160	8.5	\$42,500

Programs wishing to sub-allocate to many sites may do so.

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We are required to allocate and spend based on the fiscal year, and as the result, the amount is based on 2 calculations: 3 months of funding for the period April to June 2015 based on the number of residents in your program for July 2014-June 2015 academic year and 9 months of funding for the period July 2015 to March 2016 based on the number of residents in your program for July 2015-June 2016 academic year.

6. Faculty Support – International Medical Graduates

For programs training International Medical Graduates at the PGYI and PGYII level, additional support for faculty has been allocated on a per resident basis. Programs will receive \$2501 per resident for PGYI's and \$1251 per resident for PGYII's. This funding is to support faculty who engage in additional teaching and mentoring of IMG's in their program.

7. Distributed Training Funds

Residents who complete rotations to the designated distributed training sites in British Columbia will be reimbursed for travel and accommodation. These funds are held by the BC Interns and Residents Paying Agency. Residents will be reimbursed for their expenses by completing the resident reimbursement form that can be found on the PMGE website (<http://www.postgrad.med.ubc.ca>).

Distributed training reimbursements are prepared and approved by the program office and submitted to the PGME office for processing (including Family Medicine distributed training occurred on and after July 1, 2015). Resident travel and reimbursement is guided by HEABC/Resident Doctors of BC Collective Agreement and the following PGME policies:

- Resident Travel and Reimbursement Policy
- Accommodation Policy – Distributed Training
- Geographically Distributed Royal College Travel and Reimbursement Policy
- Community Rotations Reimbursement Policy

These policies can be found on the Postgrad Medical Education website <http://postgrad.med.ubc.ca/current-trainees/policies-procedures/>

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Schedule of PGME Funding, Budgeting and Reporting

1. Funding Distribution

FY2015-16 PGME funds will be distributed in one installment. A lump sum funding (except the funding for Teaching Combined with Patient Care) will be transferred after fiscal year end according to the actual spending as of March 31, 2016 (approved budget if actual spending exceeds the approved budget). Funding for Teaching Combined with Patient care will be distributed in fall 2015 after the full review of One45 data is complete.

2. Budget submission and approval

Postgrad Dean's Office will provide FY2015-16 eligible funding information for each program by June 15th, 2015. The FY2015-16 PGME budget proposal must be signed off by the Department Head and the Associate Director, Finance and submitted to the Postgrad Dean's office by each department prior to **July 15th, 2015**.

Once the budgets are approved, the amounts will be accrued as revenue in each program's FMS Project/Grant by PGME Finance. This new process is, in response to programs' requests, to facilitate departments and programs monitoring spending against approved budgets directly in FMS. Please note that the revenues are accrued according to approved budgets, however they are not actual funding distribution. FY2015-16 funding will be distributed after fiscal year-end once all programs' financial statements are submitted and approved by the Postgrad Dean's Office.

Starting FY2016-17, PGME budget will be prepared in conjunction with UBC Hyperion budget which is due in January each year; the budget will be based on previous year's resident FTEs. The department will then provide a Q1 forecast based on actual resident FTEs due June 30th to the Postgrad Dean's office.

3. Year End Financial Reporting

Department Head must provide the Postgrad Dean's Office with a signed financial statement confirming that these funds have been spent as per the guidelines and that appropriate backup documentation has been maintained for audit purposes. The department's FY15/16 PGME financial statement must be forwarded to the Postgraduate Office by **April 30, 2016** after reviewed and approved by the Associate Director, Finance of the cluster.

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Other Business Processes

1. Charitable Donations

Program Director stipends or clinical teaching payments cannot be redirected to charitable organizations or education funds on behalf of a Program Director or preceptor. The Program Director or preceptor who wishes to donate will be paid directly in accordance with their payment instructions. They can then submit their donations to a Fund specified by the Department through the UBC FoM donation website at <https://www.donate.startanevolution.ca/ea-action/action?ea.client.id=1730&ea.campaign.id=24357>.

2. Payments to Business Entities

Business numbers must be provided for all business entities (professional firms and group business entities) who supply teaching services to UBC. Invoices for business entities which are not registered for GST should include “small supplier” status and business number. Invoices for business entities which are registered for GST must include their GST number and GST amount.