

Title RESIDENT ROTATION TRAVEL APPROVAL AND REIMBURSEMENT	
Portfolio Physician Services – Medical Education Office	Version 30 Apr 2018

PURPOSE

Residents are often required to travel to other communities for their training. The purpose of this document is to describe the different types of travel and the requirements for approval and funding.

APPROVAL OF OUT OF PROVINCE TRAVEL

To ensure Residents are protected under the Workers Compensation Board of a receiving jurisdiction there is a requirement within Article 31.02 of the Resident Physician Agreement (also known as the PARA Contract) for Residency Training Programs to provide notice to AHS and the Associate Dean at least 3 months in advance of any out of province rotations (either within Canada or outside of Canada).

There are no numeric limits to the number of out of province rotations. However, prior to providing notice, Programs must ensure the rotation:

- satisfies the standards of training and is an opportunity that enriches the residency experience;
- does not impose any unreasonable burden on the home program's clinical service that cannot otherwise be offset by the program schedule, off-service residents, or visiting elective residents; and
- the requirements for the rotation have been clearly communicated to and understood by the resident including:
 - professional registration/licensure;
 - professional liability protection (CMPA does not provide protection in the USA);
 - emergency medical coverage;
 - for those insured by the Alberta Health Care Insurance Program...
<http://www.health.alberta.ca/AHCIP/outside-coverage.html>
 - for additional coverage within the PARA Benefits Plan...
<http://insite.albertahealthservices.ca/Files/hr-benefits-para-booklet.pdf>

Travel to other Canadian Provinces and Territories

Travel must be approved by the Program Director and forwarded a least 3 months in advance to CAL.MedicalEducationOffice@ahs.ca with details regarding the travel start and end dates, location of the rotation, and duties during the rotation (clinical, research, classroom).

- The Medical Education Office will prepare the necessary information for Payroll Accounting to register the WCB account in the respective province/territory. If a workplace incident occurs, the resident will have the choice of reporting it through AHS's incident reporting system or the host site.
- The resident should identify any expectations for assessment and on-call participation in advance to ensure program requirements and call stipends are addressed.

Travel to the USA

Travel must be endorsed by the Program Director, but final approval will be made by the Associate Dean on a case-by-case basis. Requests must be submitted at least 6 months in advance to CAL.MedicalEducationOffice@ahs.ca with details regarding the travel start and end dates, location of the rotation, and duties during the rotation (clinical, research, classroom). If the Medical Education Office (MEO) is unable to meet the receiving State's compulsory requirements for WCB registration (this excludes travel for conferences and structured, non-clinical courses), the resident will need to take an unpaid leave.

- The MEO continues to work on a solution, but currently has no mechanism for WCB in the USA.
- As the Canadian Medical Protective Association will not provide protection for medicolegal issues arising from work in the USA, residents will need to provide proof of alternate insurance.
- The Resident is responsible for navigating the J1 Visa process.

Travel outside Canada and the USA

Travel must be endorsed by the Program Director, but final approval will be made by the Associate Dean on a case-by-case basis. Requests must be submitted at least 6 months in advance to CAL.MedicalEducationOffice@ahs.ca with details regarding the travel start and end dates, location of the rotation, and duties during the rotation (clinical, research, classroom). Typically, low resource countries will not have a compulsory requirement for WCB, however, if the MEO is not able to verify that local WCB requirements have been satisfied the Resident may need to request approval for an unpaid leave of absence for the rotation.

- In addition to the requirements for travel to other Canadian Provinces, the Program must ensure all immigration and medical clearance requirements for out of country travel have been satisfied and the Resident has been registered with:
 - The Government of Canada (<http://travel.gc.ca/travelling/registration>); and
 - The University of Calgary (<https://iac01.ucalgary.ca/RiskMgmt/>); or
 - The University of Alberta (<https://www.ualberta.ca/why-ualberta/international/go-abroad/ugo-international-sos>).
- Pre-departure training with the University's Global Health program is mandatory. Sessions occur only a few times per year, so it's critical to schedule several months in advance.
- If the Resident is still functioning within their role as they would in Canada and the experience is less than 1 year, Section 28 of the Alberta WCB legislation will extend protection to the Resident. However, there may be local requirements for occupational health, professional licensure, and liability protection that can be more difficult to navigate. As well, Residents will not have protection that Alberta WCB provides from litigation by other Alberta WCB workers (e.g. if a Resident injures another worker while outside Alberta).
- The resident will also need to confirm coverage with the Canadian Medical Protective Association. In low resource countries this will often follow the humanitarian work code.

ELIGIBLE TRAVEL EXPENSES

At the beginning and end of shifts and to respond while on-call, Residents (like other workers) are responsible for the costs of transportation between home and the place of work. If a resident has been required to travel between sites during a shift, or if the resident has elected to undergo a rotation in another community for which they are responsible for the costs they may be eligible to identify the costs as a tax deduction as supported by the T2200 Form "Declaration of Conditions of Employment". T2200 Forms are printed and mailed by Payroll around March of each year to the Resident's address in ePeople.

If a resident has been required to complete a mandatory rotation in another community in order to satisfy requirements of the College of Family Physicians of Canada (CFPC) or Royal College of Physicians and Surgeons of Canada (RCPS) that are not available locally, the resident is eligible to be reimbursed for the costs of travel and accommodation.

- For rural rotations, this will occur first through Distributed Learning and Rural Initiatives (DLRI) in the University of Calgary (<http://cumming.ucalgary.ca/ruralmedicine/postgraduate>). DLRI only funds the initial transportation to and final transportation from the elective rotation. If the rotation is two or more consecutive blocks the resident may be eligible for reimbursement of a return trip between each block that can be requested through the Medical Education Office (MEO); the community must be more than 50km from the city limits of the Resident's normal community of training.
- For other mandatory rotations (typically in subspecialty programs with established inter-university affiliation agreements), Article 34.01 "Remote Mandatory Training" of the Resident Physician Agreement supports Accommodations up to \$1000 per month and one round trip for every 4 weeks to a maximum of \$1000 per trip (or subject to prior approval if greater) to be reimbursed through the MEO.

All travel and accommodation is subject to the Travel, Hospitality, and Working Session Expenses, Reimbursement, and Disclosure Policy <http://insite.albertahealthservices.ca/7324.asp>. Reimbursement requests to be paid by Alberta Health Services are submitted to the MOE through iExpense as detailed on the following page.

TRAVEL EXPENSE REIMBURSEMENT FROM AHS

The MEO currently provides reimbursement for the following remote mandatory rotations:

- Return trips between consecutive rural family medicine rotations not otherwise funded by DLRI.
- Pediatric Cardiac Surgery rotations for Cardiac Surgery subspecialty residents to the University of Alberta.
- Pediatric Dermatology rotations for Dermatology subspecialty residents to the University of Alberta and University of Toronto.

Pre-approval

All resident travel must adhere to the approval processes described earlier in this document. For expense reimbursements, additional pre-approval is only required for expenses that exceed the thresholds set by the Resident Physician Agreement (Accommodations up to \$1000 per month and one round trip for every 4 weeks to a maximum of \$1000 per trip) and should be emailed to Robert.Bunn@ahs.ca.

NOTE: All travel and accommodation is subject to the Travel, Hospitality, and Working Session Expenses, Reimbursement, and Disclosure Policy <http://insite.albertahealthservices.ca/7324.asp>. As well, the AHS Travel Management Program (<http://insite.albertahealthservices.ca/travel.asp>) may provide opportunities for discounts on travel and accommodation.

Reimbursement Request

Alberta Health Services has implemented electronic expense processing to improve tracking, follow-up, and turn around times. Residents are required to take the iExpense training before you will be able to submit your first claim.

To register for training go to MyLearningLink (<http://mylearninglink.albertahealthservices.ca/elearning/bins/index.asp>). Please note that it could take up to 5 business days for you to receive your Oracle user ID and password (which will then be emailed to your AHS email address).

1. Login to iExpense (<http://insite.albertahealthservices.ca/11122.asp>) using your Oracle user ID and password (this is different from your AHS network account and can only be obtained after completing the mandatory training). Then browse to “AHS Internet Expenses”.
2. At the top of the Expenses Home Page, select “Create Expense Report”. Select the Expense Template “PARA”, provide a title that suits the expenses and date range (e.g. “Rotation – Toronto 180926 to 181023”), and click “Next”.
3. For each itemized receipt, complete a line item within the “Receipt-Based Expenses” tab.
 - Start Date = date on the receipt
 - Receipt Amount = eligible expense
 - Expense Type = select most appropriate (use “miscellaneous” for criminal record checks and registration fees).
 - Business Reason = “Mandatory Rotation” and description of the expense
 - Expense Location = “AB – Other Zones” if attended in Edmonton or “ON” for Toronto rotations.

For each expense line, click on the Details button to enter additional information (Justification = re-enter the title of the Business Reason).

4. If you used your own car, you may claim mileage on the “Mileage Expenses” tab.
 - Start Date = travel date
 - Expense Type = “Mileage-Other”
 - Business Reason = e.g. “Mandatory Rotation – Edmonton April 5 to May 27 – return trip April 28”
 - Trip Distance = mileage in KM

For each mileage line, click on the Details button to enter additional information.

NOTE: Residents are not eligible for Per Diem Expenses.

5. Once all expenses have been added to the list, click “Next”.
6. For each expense, populate the Expense Allocation and then click “Next”.
 - Balancing = 103
 - Site = 0788
 - Functional Centre = 71880100001
7. From the summary page, review the expenses and click “Submit”. You will be prompted to email your receipts.

NOTE: Requisitions with incomplete information, missing documents, or ineligible expenses will be denied and notice sent to the Resident’s AHS email address.

Missing Receipts

Per the AHS Travel, Hospitality, and Working Session Expense – Approval, Reimbursement and Disclosure Policy (<https://www.albertahealthservices.ca/Assets/about/policies/ahs-pol-expenses.pdf>), Residents who have lost or not received a receipt for amounts up to \$200 may still request reimbursement, but must upload an Attestation with their request. A template is provided below and whenever possible, evidence of the expense should be provided (e.g. a credit card statement).

I, _____ [resident name], attest that I am unable to produce the receipt for _____ [description] totaling \$ _____ [amount] incurred on _____ [date] as _____ [reason]. This expense was incurred and was related to AHS business and has not been claimed previously.

Signed this ____ day of _____ [month], ____ [year].

Signature: _____

Printed Name: _____