Please review the following document in its entirety before requesting purchases using UWMF Professional Development funds.

For Geriatrics Faculty instructions, begin on Page 2
For Geriatrics APP instructions, begin on Page 7
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

This year your allotment will be $3000.00, please note these funds are effective July 1, 2020 – May 1, 2021. See the policy guidelines on page 3.

Note that in FY21, the following overarching changes apply to all PD funds.

Samantha Bolin (sabolin@medicine.wisc.edu) is your key contact for all PD fund questions, approvals, and reimbursements.

1. If you have not already, establish your Oracle Cloud environment prior to spending PD funds. See the images below for adding delegates to your Oracle Cloud environment.
   - Required delegates to add:
     - Amanda S. Koehn (the A and S must be uppercase)
     - Samantha Bolin

2. Obtain approval for using PD funds from Samantha Bolin prior to spending. Pre-approval is required on all spending and reimbursements. Please provide all details of the item you wish to use PD funds for in order for the item to be approved, including any website links, etc. Please allow a minimum of 3 days to approve expenses before orders are placed. All PD expenses will be reviewed very carefully and anything that is deemed frivolous will be sent back. There needs to be a very solid business case for the expense. The expectation is that funds will not be spent just to spend them, and that the funds are used for necessary professional development and business expenses.

3. Following approval of the item, Samantha will indicate if Geriatrics will purchase the approved PD item or if you will need to purchase the item and submit your itemized receipt.
   - If Geriatrics will purchase the PD item, Geriatrics will handle the full process. Note: Wherever possible, Geriatrics prefers to purchase the PD item for you to reduce the number of reimbursements.
     - Items that Geriatrics is not able to purchase in advance using PD funds are travel related expenses such as hotel rooms and meals.
   - If you need to purchase the PD item(s) on your own, you still need to obtain pre-approval to purchase and once purchased, the division office will submit an expense report for your approval. Send all itemized receipts directly to Samantha Bolin (sabolin@medicine.wisc.edu).
     - If you are currently receiving a UWMF paycheck, your reimbursement will be completed through your bank account within Oracle Cloud, if you provided this information.
     - If you are not currently receiving a UWMF paycheck or you did not provide your bank account information, you will be mailed a paper reimbursement check to deposit.
   - Note: Due to the complexity of coding PD funds within Oracle Cloud, any reimbursements not submitted through Samantha Bolin will be rejected. The Oracle Cloud will not allow anyone in the Geriatrics Division Office to correct a reimbursement that does not have appropriate coding, and to remove frustration from identifying the coding to use, all reimbursements are being handled by Samantha Bolin.
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

Below are the instructions for establishing delegates:

- Visit [https://uconnect.wisc.edu/](https://uconnect.wisc.edu/)
- Select Quick Links > Oracle Cloud

- Log in with your UW Health username and password

- Select Expenses

- On the right hand side, there is a ‘Tasks’ box, click on the box and select Manage Delegates

- Select the + sign, and search and add Amanda S. Koehn (the A and S. must be uppercase)

- Hit Save before exiting
- Continue and add:
  - Samantha Bolin

- Hit Save and Close
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

Professional Expense Policy

Amount and Terms:
- $3,000 for the fiscal year
- May only be used for that person's business expenses
- Amount will be pro-rated to an individual's start-date
- Amount will be pro-rated to an individual's appointment FTE. An individual with a less than full time appointment may receive the full time status allocation during the fiscal year only with Division Head approval. Such approval should be determined annually.
- Due to year-end processing, expenses are required to be submitted by May 1st.
  - Unused PD funds may not be carried over from one year to the next
- Upon notice of termination by an individual:
  - Any Information technology equipment reimbursed via this policy must be returned to the department upon departure of any individual. (This includes, but is not limited to: ipads, laptops, PDS’s, desktops, etc.)
- Use of PD funds will be at the discretion of the Division Head and DOM Leadership

Qualifying Expenses:
- Only items that meet IRS guidelines for business expenses will qualify for this allowance
- In general terms, this means that the expense must be an ordinary and necessary expense incurred by employees for use by that employee in the business of the UWMF (medical group practice)
- Refer to the professional expense examples section for a listing of types of allowable and not allowable expenses, and remember to obtain approval prior to purchasing and if the purchase will be made directly by the Division Office or if you will need to purchase and receive reimbursement

Payment of Invoices:
- Submit the complete original invoice (not just the remittance notice) well in advance of the due date and we will process the payment for you

Travel Expenses:
- A reminder that there is no travel allowed in first six months of year. Travel costs for travel occurring before January 1, 2021 will not be reimbursed by UW Health as a result (i.e. airfare, hotel, rental car, etc). Travel occurring after December 31, 2020, may be reserved and paid prior to Dec 31st only upon approval and strong business case that can be presented to the Division Chief and the Department Chair, with all requiring Department Chair approval.
- All travel must be booked via the UW Health Oracle Cloud
- Contact Samantha Bolin no less than 3 weeks prior to your travel to get started on booking travel

Reimbursement:
- Reimbursement requests must be submitted within 90 days of when the purchase was made. All itemized receipts must accompany the request for reimbursement no later than 2 weeks prior to the end of the 90 day window to ensure timely processing. It is recommended to submit your reimbursement request directly following a conference or travel or when the expense was incurred.
- Submit all reimbursement requests (with receipts) to Samantha Bolin (sabolin@medicine.wisc.edu).
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

- Verify that you have setup your bank account and delegates in Oracle Cloud (UConnect > Quick Links > Oracle Cloud or [LINK]). Please note that the UConnect link is found under Quick Links from the DOM Website or [HERE].
  - Note: If you do not currently receive a UWMF paycheck, you will be mailed a paper check.
- Verify that you have setup email notification so you are notified when there is a reimbursement that needs to be edited.
- Expenses not submitted within the current fiscal year will not be submitted for reimbursement. Every effort should be made to capture the expense in the fiscal year in which it was incurred. It is recommended that reimbursements be limited to two per month.
- If you have paid the bill and are requesting reimbursement, submit a copy of the complete original/itemized invoice and proof of payment (either a receipt for payment showing the last four of the card number used, a copy of your canceled check, or a copy of your credit card statement). If you do not have an itemized receipt for your purchase of multiple items on a single payment, it will not be approved for reimbursement.

Professional Expense Examples

Technology/IT equipment and software MUST be pre-approved through the Division Administrator, once approved from Samantha Bolin. Note that technology/IT equipment and software can ONLY be ordered through DOM IT. If ordered through another source, it will not be reimbursed and not be allowed to be used on the DOM network.

Examples of allowable professional expenses.
Any item that meets IRS guidelines for business expenses is generally an allowable expense, but all expenses require approval prior to purchase. This includes, but is not limited to, the following:

- Memberships and dues of medical organizations
- Medical books
- Subscriptions for medical journals and publications
- Medical licenses not necessary for Department of Medicine clinical activities
- Registration for medical conferences
- Travel, lodging, mileage and business phone calls at medical conferences (requires pre-approved travel form)
- Meals during travel dates
  - MUST have itemized receipts, receipt contain only your travel meals and no alcohol
- Stethoscopes
- Lab coats and monogramming
- Medical software
- Medical cassettes, CDs, videotapes and slides
- Board certification expenses
- Computers, iPads, etc (must have prior approval and no more than 3 electronic devices per faculty)
  - Prior to purchasing a computer, etc, the DOM IT reference list will be checked to confirm the number of devices and type of device you have. If you are purchasing a replacement, the existing item must be returned prior to receiving the new item.
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

Examples of expenses that are not allowable
Any item that is primarily for personal nonprofessional use and not allowable under IRS guidelines for business expenses. This includes, but is not limited to, the following:

- Office supplies
- Printers
- Office furniture (desk, desk chair, etc.)
- Personal life and disability insurance policy premiums
- Contributions to an office 'sunshine fund'
- Memberships or subscriptions to non-medical associations, organizations, journals, or subscriptions
- Personal use software, electronics or other purchased items
- Spouse or family member's travel costs, parking tickets, or other fines
- Pay-for-view movies in hotel/motel room

Examples of expenses considered division expenses - not professional allotment expense

- Medical licenses for Department of Medicine clinical activity
- DEA licenses for Department of Medicine clinical activity
  - Please ask Samantha Bolin (sabolin@medicine.wisc.edu) for the procedures prior to renewing

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608-265-7777 or 888-443-5511
Division of Geriatrics - UWMF Professional Development (PD) Funds for 2020-2021

This year your allotment will be $1,500.00, please note these funds are effective July 1, 2020 – May 1, 2021. See the policy guidelines on page 3.

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