

## **MSH UHN AMO Professional Development Policy & Procedures**

### **Purpose:**

The purpose of this policy is to describe the eligibility parameters and adjudication process that will inform the awarding of professional development (PD) funds by the MSH UHN AMO.

### **Background:**

The MSH UHN AMO budgets \$50,000 per year in PD funds to support the education and ongoing professional development of Management Committee members and AFP Group physicians. It is expected that this funding will directly benefit the Organization by advancing the non-clinical knowledge, skills and leadership capacity of its committee members and the group physicians across the AHSC.

### **Eligibility and Funding Support:**

The MSH UHN AMO will provide PD funding for individuals to undertake approved non-clinical professional development opportunities. Eligible recipients include:

- (1) MSH UHN AMO Management Committee members, who may receive up to a maximum of \$10,000 in PD funding, and
- (2) AFP Group Physicians, who may receive up to 50% of the cost of the PD, to a maximum of \$5,000. As an added requirement, AFP Group Physicians requesting PD funding must provide a letter of support from their practice plan lead or division/department head and must confirm that they have secured matching support from another source, which may include, but is not limited to, the practice plan, hospital, university, or the physician.

Within these PD funding limits, individuals may also apply for the reimbursement of expenses that directly relate to attending the approved course. These expenses may include, but are not limited to, economy class airfare, accommodations, car rental/taxi fees, and meals. Reimbursement policies for travel are directly informed by the Ontario Government's Broader Public Sector Accountability Act (BPSAA).

Priority will be given to current members of MSH UHN AMO sub-committees and Management, as these roles are integral to the operations and strategic objectives of the Organization.

PD funding will only be provided net of any other financial support provided by other entities – all funding must be declared.

## **Application Process:**

All requests for PD funding must be submitted to Management by January 15 each year for courses to be taken in the subsequent fiscal year of April – March. For the first year of the revised PD policy (the “transition year”), the application deadline to Management will be April 30, 2025 for courses to be taken in the fiscal year 2025/26.

AMO Management is responsible for receiving, adjudicating and processing payments for all PD funding requests based on the MSH UHN AMO’s Professional Development Policy and Procedures.

Requests for PD funds and the corresponding approval process must be completed in advance of the course or training being taken. Requests for PD funds that are received after the course has taken place, without prior approval, will be denied. Further, PD funding requests must identify the timeline for when the course or training will be completed and the fiscal year in which PD funding is being requested. PD courses that are not completed in accordance with the approved PD funding request may be denied for reimbursement.

The MSH UHN AMO has developed a Professional Development Support Package (PDSP) (attached) to guide the process for PD requests and reimbursements. The package contains three parts – 1) the Professional Development Support Request Form, 2) the MSH UHN AMO Travel Expense Policy & Course Reimbursement Claim Form, and 3) the Professional Development Course Review Form. All PD request forms must be accompanied by a budget with a breakdown of the course or training registration fees, estimated travel, accommodations, and meal costs, and any other incidentals. All compensation applied for and/or received from other sources must also be declared.

The approval of PD funding requests will only apply to the fiscal year for which it was approved and as such, PD funding will not carry over to subsequent fiscal years in the event of delays/postponement of the course, or to delays requesting reimbursement for such activities. In this event, requests for reimbursement for PD funds will be denied.

\*In the event there are unallocated funds in a given fiscal year, the AMO will permit additional PD applications for courses to be completed in the current fiscal year.

\*Management will maintain a PD Funding Register of all PD funding requests and approvals on a per fiscal year basis. The PD funding register will be included as part of the annual budget and quarterly financial reporting materials that are presented by Management to the Finance & Audit Committee.

**Reimbursement:**

Upon completion of the course or training the individual must complete and submit an MSH UHN AMO Reimbursement Form (part 2 of the PDSP) along with the Professional Development Course Review Form (part 3 of the PDSP). Original documents (credit card statements, registration confirmations, receipts) must be submitted to confirm actual expenses incurred.

Management will assess the expenditures that are being requested for reimbursement against the Professional Development Support Request Form that was approved prior to the individual taking the course. After confirming that expenditures are in line with the Organization's Travel Expense Policy, which is informed by the Broader Public Sector Accountability Act, Management will calculate final reimbursements. Management will also ensure that the Professional Development Course Review is properly completed before processing reimbursements. These reviews will be catalogued by Management to inform the approval process for subsequent requests for support for the same course.

Reimbursement will only be processed by the MSH UHN AMO directly to the individual who received approval for PD support (no 3rd party payments).

# MSH-UHN ACADEMIC MEDICAL ORGANIZATION

## PROFESSIONAL DEVLEOPMENT SUPPORT REQUEST FORM

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**PHYSICIAN:**

NAME		PRACTICE PLAN	
ROLE WITH PRACTICE PLAN OR AMO			

**COURSE:**

COURSE TITLE		WEBSITE LINK	
INSTITUTION/ORGANIZATION		START/END DATES	

PROVIDE A BRIEF DESCRIPTION OF THE PROFESSIONAL DEVELOPMENT ACTIVITY

OUTLINE WHY YOU CHOSE THIS ACTIVITY AND HOW IT IS RELEVANT TO YOUR ROLE WITH THE MSH UHN ACADEMIC MEDICAL ORGANIZATION OR WITH YOUR PRACTICE PLAN

**FINANCIAL:**

<p><b>HAVE ADDITIONAL FINANCIAL SUPPORTS BEEN REQUESTED FROM ANOTHER ENTITY</b></p>	<p>Yes      No</p>	
<p><b>IF YES, IDENTIFY THE AMOUNT THAT YOU REQUESTED AND NAME OF THE ENTITY</b></p>	<p>Amount:</p>	<p>Entity:</p>

**PLEASE PROVIDE THE FOLLOWING DETAILS OF THE FINANCIAL SUPPORT THAT YOU ARE REQUESTING FROM THE MSH UHN AMO (NET OF AMOUNTS REQUESTED FROM OTHER ENTITIES).**

<p><b>PURCHASE TYPE</b></p>	<p><b>EXPENSE DESCRIPTION</b></p>	<p><b>COST (CAD)</b></p>
<p>Registration Fees</p>		
<p>Travel</p>		
<p>Accommodation &amp; Meals</p>		
<p>Other costs</p>		
	<p><b>TOTAL REQUEST</b></p>	

## **MSH-UHN Academic Medical Organization Travel Expense Policy**

The following policy applies to:

1. Members of the MSH UHN AMO who have received approval to attend courses or training in accordance with the professional development policy.
2. Members of Management who are required to attend meetings external to UHN-MSH on behalf of the MSH UHN AMO.
3. Consultants and other professionals who have been engaged by the MSH UHN AMO and where prior written approval by Management has been provided of the specific travel related expenditures that will be reimbursed by the MSH UHN AMO.

This policy is intended to serve as a directive to inform the travel related expenditures that will be reimbursed by the MSH UHN AMO and should not in any way be interpreted to supersede other MSH UHN AMO policy, including, but not limited to, the MSH UHN AMO Professional Development Policy and Procedure. The MSH UHN AMO Travel Expense Policy is informed by the Ontario Government's Broader Public Sector Accountability Act (BPSAA) and the Ontario Government Travel, Meals and Hospitality Directive. Prior approval by the MSH UHN AMO is required for all forms of travel.

Claimants must:

- Complete and sign the appended "Reimbursement Form".
- Submit original, itemized receipts with all claims.
- In the absence of an itemized receipt, a written explanation of why the receipt is unavailable must be submitted and a description itemizing and confirming the expenses must be provided. In such cases, alternative documentation such as credit card statements should be submitted to confirm the expenditures.
- Claimants may not approve their own travel expenses.

Upgrades to the type or form of travel indicated in this policy and/or exceeding stated amounts will be considered personal in nature and will therefore not be subject to reimbursement by the MSH UHN AMO.

### **1) Transportation:**

The type of transportation used (plane, train, personal auto, taxi) must be reasonable in consideration of the required travel distance. Travel and auto insurance is the responsibility of the individual and not the MSH UHN AMO and will not be subject to reimbursement.

Airplane - Air travel is permitted if it is the most practical and economical way to travel. Economy (coach) class is the standard option for ticket purchase.

Train - Travel by train is permitted when it is the most practical and economical way to travel.

A coach class economy fare is the standard. Business class may be acceptable if required to work with a team or choosing a travel time that allows you to reduce expenditures on meals or accommodation (e.g., compare an economy (coach) class ticket plus a meal, with the cost of a ticket for VIA 1, where the meal is included);

Car - When road transportation is the most practical, economical way to travel, the order of preference is:

- Rental vehicle.
- Personal vehicle, if it is more economical than a rental vehicle

The MSH UHN AMO shall assume no financial responsibility for the use of your own vehicle other than paying the kilometric rate.

If driving more than 200 kilometers in a day or going to drive a personal vehicle for more than five days within a single calendar month, a rental vehicle is recommended. For personal vehicle use, the reimbursement rate is \$0.55 per kilometer (subject to change). Expense claims must be submitted with distances calculated in kilometers.

Parking and Tolls - Reimbursement is provided for necessary and reasonable expenditures on parking, as well as tolls for bridges, ferries and highways. There is no reimbursement for traffic or parking violations.

Taxis: Taxi costs should only be claimed for travel within the city where the meeting is located. Use of local public transit is encouraged as much as possible at the destination of travel. The use of Uber or Lyft is permitted provided that a receipt is provided to confirm this form of transportation.

## **2) Accommodations:**

You may claim hotel expenses if the time of the meeting and/or distance required to travel to the meeting requires that you stay at a hotel. There will be no reimbursement for hotel suites, executive floors or concierge levels when traveling. Reimbursement will be made for standard accommodation (single room with bath). A detailed bill for the accommodation is required, and expenses such as entertainment, mini-bar and special facility charges are not eligible for reimbursement.

## **3) Tips/Gratuities**

You may be reimbursed for reasonable gratuities for porter, hotel room services, taxis and ride sharing services. Keep a record of gratuities paid, as these must be included in your expense reimbursement request.

#### **4) Telecommunication**

With prior approval, you may use your cell/mobile phone for business purposes when traveling. Wherever possible, you are expected to use the least expensive means of communication. Cell phone/data travel plans should always be purchased to ensure the least overall cost for the period of travel (i.e. for short duration travel, use of daily fixed rate plan for cell phone/data; for longer travel, compare the daily fixed rate plan with the pre-purchase of a cell phone/data usage plan or by purchasing a SIM card in the destination country).

#### **5) Meals**

Reasonable and appropriate meal expenses may be reimbursed. Meal expenses may be claimed when you are away from the office area over a normal meal period; or have prior approval for the expense (e.g., a business meeting within the office area that must occur over lunch).

Meals must be purchased in order to be able to submit a claim for reimbursement. Alcohol cannot be claimed and will not be reimbursed. Receipts are required to support meal expenses claimed. The total allowable meal allowance is calculated by multiplying the number of travel days by the applicable per diem rate. In limited and exceptional circumstances (e.g. health considerations; limited options available) where a meal expense is higher than the meal reimbursement rate, the actual cost of the meal may be reimbursed. In these situations, the claim for meal reimbursement must be accompanied by an original itemized receipt and a written rationale for exceeding the rate. A credit card slip is not sufficient.

The per-diem meal allowances are as follows:

- Travel within Canada: Up to \$50 CAD per day.
- Travel outside of Canada: Up to \$75 CAD per day.

These per-diem rates are to cover all meals during the travel period.

# MSH-UHN ACADEMIC MEDICAL ORGANIZATION

## PROFESSIONAL DEVELOPMENT REIMBURSEMENT CLAIM FORM

EXPENSES*	DESCRIPTION / REASON FOR CLAIM	AMOUNT CLAIMED	***FOR MSH UHN AMO USE ONLY***	
			PAID	REASON FOR CHANGES
COURSE FEE (INCLUDING TAXES)				
TRANSPORTATION (AIR, RAIL, CAR)				
TAXI / UBER				
PARKING / TOLLS				
ACCOMMODATIONS				
MEALS				
	<b>TOTAL</b>			

\* PD FUNDING WILL ONLY BE PROVIDED NET OF ANY OTHER FINANCIAL SUPPORT PROVIDED BY OTHER ENTITIES – ALL FUNDING MUST BE DECLARED.

SUBMITTED BY:

\_\_\_\_\_

NAME

\_\_\_\_\_

SIGNATURE

\_\_\_\_\_

DATE

# MSH-UHN ACADEMIC MEDICAL ORGANIZATION

## PROFESSIONAL DEVELOPMENT COURSE REVIEW

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NAME		PRACTICE PLAN	
COURSE TITLE		COMPLETION DATE	

WHY DID YOU CHOOSE THIS COURSE, WHAT WERE YOUR LEARNING OBJECTIVES?

DESCRIBE THE QUALITY OF THE COURSE AND RATE YOUR OVERALL EXPERIENCE AND LIKELIHOOD OF RECOMMENDING THE COURSE TO A COLLEAGUE.

HOW DID THE COURSE IMPACT YOUR PROFESSIONAL DEVELOPMENT AND WHAT WILL YOU DO DIFFERENTLY NOW THAT YOU'VE ATTENDED THE COURSE?

DESCRIBE HOW YOU AND OTHERS MAY APPLY THE COURSE CONTENT TO THE WORK OF THE MSH UHN AMO