

DEPARTMENT OF NEUROLOGY
UNIVERSITY OF PENNSYLVANIA HEALTH SYSTEM

SUBJECT: Professional Expense Allowance (PEA) Policy

PURPOSE:

The intent of this program is to provide funding for certain professional expense allowance associated with the individual's role at Penn Medicine.

SCOPE:

This policy applies to attending physicians who are CPUP members, research faculty and nurse practitioners in the Department of Neurology in the Clinical Practices of the University of Pennsylvania (CPUP) as well as designated Research Faculty under the Perelman School of Medicine.

IMPLEMENTATION:

This policy will be implemented and monitored by the department Chair and Chief Operating Officer.

PROCESS AND PROCEDURE:

- Each faculty member and NP[^] receives a pre-determined PEA with an amount annually to be spent on professional expenses as described below. This amount will be inclusive of all items listed below.
 - **CPUP Physicians receive \$5,500 annually.**
 - **Research Faculty receive \$2,500* annually.**
 - **NPs receive \$1,500* annually.**
 - **Instructors will not receive a PEA, but will have DEA and license registration expenses covered by the department.**
 - **Excess balances at the end of year fiscal year will not be carried over to the next fiscal year.**

[^]Adjustments will be made at the discretion of the Chair for faculty and NPs, who are not a full time FTE. No PEA will be awarded to individuals who are less than 60% of full time effort.

**The amount is prorated for the portion of the fiscal year worked.*

Consistent with CPUP/UPHS policies, the following items are generally allowable on the PEA:

- Monthly parking in UPHS/Penn parking facilities
- Dues, memberships to professional societies
- Subscriptions to professional journals
- Medical textbooks or other educational materials and software
- Travel to society meetings, seminars, review courses, and registration and travel to national or international meetings to participate in updates, roundtables or luncheon conferences where the organization does not pay for speakers
- Business Meal Expenses
- Personal Meal expenses

- Medical licensure in PA and DEA registration+
- Medical Board examinations including associated travel costs
- Computer hardware and software used for professional purposes and any accompanying repairs and/or maintenance agreements
- Laptops, iPads/Tablets for professional use~
- For those individuals with public transportation passes, when public transportation is unavailable to arrive to/from work, or for emergency/on-call time, the use of a taxi or Uber/Lyft can be charged to PEA up to a max of \$100/year. This is not applicable to expenses related to other travel.

+Out of state licenses will be covered outside of the PEA if needed for UPHS related work. For NPs, state and DEA licenses will be covered outside of the PEA allowance. In addition, Instructors' state licenses and DEA licenses will be covered outside of the PEA.

~Reimbursement for more than one of the same item within a 3-year period is not allowed without written justification and approval by the chair or COO.

The following items are generally NOT allowable on PEA:

- Contributions to not-for-profit organizations
- Personal expenses
- Meal expenses and snacks except as allowed under the CPUP and University travel policies (see above)
- Office décor
- Gifts to other employees, faculty or trainees
- Work attire except white/lab coats and OR shoes

Exceptions to the Policy are at the discretion of the chair and COO and must be approved prior to incurring any expense.

REIMBURSEMENT:

- Submission for reimbursement for expenses, must be requested in the same fiscal year as the expense was incurred.
- Each individual is responsible for any amount that exceeds the yearly amount of \$5,500. Any reimbursements that go over the \$5,500 yearly amount cannot be applied to the next fiscal year.
 - Each individual may have discretionary funding on a School of Medicine account or on a CPUP account that could be used to cover the amount over their annual limit. The Business office will work with each individual that would like to get reimbursed for this excess amount from their discretionary funding.
 - Examples of discretionary funding: Board Review, Start-Up Funds, and Gifts
- Submission of expenses without Concur or Chrome River:
- **In order for an expense to be paid out in the current FY PEA, it must be submitted by 6/30 and within 90 days of being incurred.**
- Questions about whether an expense is eligible for reimbursement from PEA should be sent to the Director of Finance.

DOCUMENTATION:

- All submissions for reimbursement of expenses must include Acceptable Proof of Payment for Reimbursement Purposes in Concur and Chrome River.
- Proof of both payment and what is being paid is needed for reimbursement purposes.

EFFECTIVE DATE: 07/1/18

This policy is subject to change. It supersedes all previous policies regarding the professional expense allowance.

Approved by Neurology Finance Committee 08/02/18 and 10/17/18.

Authorized By: _____ **Date:** 10/22/18

Updated: 10/22/2018

Frances E. Jensen, MD

Chair for the Department of Neurology