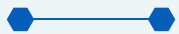


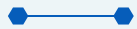
Radiology Purchasing and Expense Reimbursement

Fiscal Year 2023 (FY23) | July 1, 2022 – June 30,
2023





UWH Radiology Annual Expenses Allowances



1st Yr Resident Annual Allowances

- **Business Expense - \$1,000**
(Yr 1 only, see next slide for Yr 2-4)
 - Can be used for meeting registration/business travel, American Board of Radiology fees and societal dues, books
- **Meeting Presenting - \$2,500**
 - Can be used for multiple meetings, must provide proof of presentation

Fellow Annual Allowances

- **Business Expense - \$1,500**
 - Meeting registration, travel, books (if purchased within 1st 6 months)
- **Meeting Presenting - \$2,500**
 - Can be used for multiple meetings, must provide proof of presentation
 - Additional funds may be requested for projects or presentations of significant merit. Pre-approval by the Section Chief and Finance Committee Chair must be granted prior to committing to the project/presentation or incurring expenses.
- **Society Dues - \$1,000**
 - Payment or reimbursement will be prorated to the end of your UW appointment
 - Example: UW appointment: 7/1/2022-6/30/2023
Dues renewal: 1/1/2023-12/31/2023
Payment or reimbursement will be 1/1/2023-6/30/2023 or 50% of the total dues cost

Resident Business Expense Allowances

○ DR/IR Resident Business Expense Allowances

- 1st Year Residents: \$1,500
- 2nd Year Residents: \$1,000
- 3rd Year Residents: \$1,250
- 4th Year Residents: \$1,250
- 5th Year IR Residents: \$1,500
- 6th Year IR Residents: \$1,500

○ Nuclear Medicine Resident Business Expense Allowances

- 1st Year Residents: \$500
- 2nd Year Residents: \$500
- 3rd Year Residents: \$500

○ Chief Residents

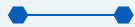
- Junior Chief Resident (3rd Year): $\$1,250 + \$1,000 = \$2,250$
- Chief Resident (4th Year): $\$1,250 + \$1,000 = \$2,250$

Annual Allowances

- Allowances are prorated to your FTE and start date
 - If you are .80 FTE, you will receive 80% of the annual allowance (and pay, earned vacation, etc..)
- Allowance balance
 - We are in the process of developing a new process and you will receive an email about how to access your balance. In the meantime, please email finance@rad.wisc.edu if you have any questions.



Meriter Moonlighting

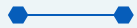


Meriter Moonlighting

- Accredited fellows have the opportunity to moonlight at Meriter: \$1,750 per shift or \$2,250 for holiday shifts
- Moonlighting requires a 5% University clinical instructor appointment which provides malpractice insurance for accredited fellows
- Moonlighters must first work off the cost of their clinical instructor appointment prior to receiving shift pay for their moonlighting work
 - This is typically accomplished after two shifts



Purchasing



○ The Radiology Finance Team can purchase items on your behalf using our corporate cards, including:

- Conference registration
- Airfare
- Memberships and societal dues
 - Note: if the renewal period extends beyond your appointment end date, you will need to purchase and submit for a prorated reimbursement
- Recruitment related food and beverage
- Educational or professional development books
 - Note: these are subject to the Tangible Property Policy referenced later in this presentation

Please reach out to finance@rad.wisc.edu prior to incurring any expenses



- Burlington Medical is our contracted lead vendor
- To purchase lead products, please obtain a quote from our Account Manager, Jennifer Rook
- Send your quote to your administrative assistant or finance@rad.wisc.edu for payment



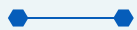
Jennifer Rook, Account Manager

Jennifer.Rook@burmed.com

Ph (630) 335-3492



Expense Reimbursement



First Steps



UWH (Hospital Funds)
Oracle Cloud

- Expense reimbursement is conducted through Oracle Cloud
- Set up an initial profile, including bank account information
 - Instructions will be emailed
- You will need to assign delegates; this is essential to the reimbursement process--you cannot be reimbursed without delegate assignment.
 - Instructions will be emailed



UWH (Hospital funds)
CorpTrav Booking Agency
GetThere Booking Tool

- All airfare is required to be booked through CorpTrav
- All hotels are required to be booked through CorpTrav, unless it is the conference site hotel booked through the conference website (proof required)
- All vehicle rental must be pre-approved by finance, email finance@rad.wisc.edu
- CorpTrav is accessed through Oracle Cloud; your profile needs to be updated with frequent flier and security information (e.g. passport, ID)

- Supporting documentation for your expense reimbursements is compiled and entered into Oracle Cloud by your delegates
 - Residents: Maggi Schrader, Aaron Pinkston, Rosa Retrum
 - Fellows: Your Section's administrative assistant(s)
- Expense reimbursements must be submitted in Oracle Cloud within 60 days of incurring the expense, or within 60 days of the last day of the conference

Proper Receipts

For your expense to be reimbursed, you must supply a proper receipt, as outlined below.

1. Your receipt must be itemized (see example)
2. Alcohol must be clearly identified
3. Whenever possible, please pay for your meal individually. If this is not possible, and the meal expense was split, you will need to identify which items were yours.
4. Your receipt must show the last four digits of the credit card used
 - If you do not have this documentation, you will need to supply a credit card statement in addition to your receipt
5. Your receipt must show a \$0 balance
6. Vehicle rental receipts should include the rental contract (rentals must be pre-approved in advance of booking)
7. Tips/Gratuuity are eligible for reimbursement at a maximum of 20% (i.e. meals, ground transportation, etc.)
8. Group business meals must include an agenda or itinerary, business purpose, and list of attendees

Not itemized Not reimbursable

Harvest Moon
12125 N Oracle Rd D5
Tucson, AZ 85739
TEL: 520-825-5351
www.harvestmoontucson.com

CARD TYPE : MC
CARD HOLDER : ██████████
CARD NUMBER : ██████████
EXPIRATION DATE : XXXX

DATE : 2013-11-11 TIME : 1:57:34 PM

Invoice# : 00301111
Table# : B05
Server Name : CYNTHIA_LOPEZ

Charge Amt\$: 19.46

TIP AMOUNT\$ _____

FINAL AMT\$ _____

Itemized Reimbursable

Harvest Moon
12125 N Oracle Rd D5
Tucson, AZ 85739
TEL: 520-825-5351
www.harvestmoontucson.com

Re-Printing 1

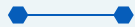
Dine In # 30
Date: 11-11-2013 Time: 1:23PM

Server: CYNTHIA_LOPEZ
TAB#: B05
No. of Guest : 2

1 L- Cashew Chicken w. Brown Rice w. Egg Flower Soup	7.50
1 L- Mongolian Chicken w. Brown Rice w. Egg Flower Soup	8.00
1 Hot Tea (per pot)	2.50
Amount :	18.00
TAX(8.1%) :	1.46
TOTAL :	19.46



Policy and Procedure



Travel Policy and Procedure Highlights

- CorpTrav/GetThere is UWH's required booking tool for airfare, rental vehicle, and lodging reservations. You will NOT be reimbursed for any booking made outside of CorpTrav/GetThere, except in cases where the conference site hotel was booked through the conference website for a single occupancy standard room (proof required).
- Conference Presenting or Attendance Reimbursement Documentation
 - Conference brochure including name, date, and location of the conference, and an itinerary that outlines which meals were provided
 - If presenting, please provide proof of presenting (e.g. itinerary that lists your name and presentation title)
- Incidentals eligible for reimbursement with itemized receipts include:
 - Meals – actual expenditures (20% tip maximum) up to \$70 per day
 - Ground Transportation
 - Baggage fees

Adding Personal Travel to Business Travel

- Over 50% of the trip must be business related. Scheduling incidental business activities during a trip does not constitute a business trip.
- You are required to supply a comparison airfare directly from the CorpTrav travel agent or the GetThere booking tool.
 - 3rd party online searches are not an acceptable comparison airfare.
 - A comparison airfare provides a cost comparison between the flight you selected, and the cost of the flight had you not added personal travel.
 - The comparison airfare must be obtained at the time of booking. Comparisons gathered after the fact will not be accepted.



CorpTrav Travel Counselor (Agent)

Ph (630) 656-6545

CorpTrav Online Assistance

Ph (630) 656-6598

onlinesolutions@corptrav.com

Technology Purchasing

- **Items considered technology include:**
 - Desktop computers, monitors, printers, additional internal computer components, external hard drives, flash/thumb drives, laptops, iPads and tablets, computers software and apps, ear buds and headphones
 - Items must be predominantly used for business or educational purposes
 - All items have policy driven cost limitations.
 - Cell phones are not eligible for purchase or reimbursement
- **All technology purchases are required to be reviewed and approved by the Radiology IT Help Staff. An email with the requested item(s) can be sent to rad-help@uwhealth.org for consideration. Reasonable cost items are expected.**
- **Once approved, the Help Desk and Finance Team will work together to purchase approved item(s) following required purchasing rules and mandatory contracts**
- **All technology purchasing is subject to the Tangible Property Policy (see next slide)**

Tangible Property Policy – Physical Property with Value

- The usable life of any tangible property is called the useful life cycle, which is determined by Radiology IT.
- Items purchased that have a useful life beyond your appointment end date are required to be returned.
- All technology purchases, as well as education or professional development books are considered tangible property with a useful life. Therefore, these items are not eligible for purchase or reimbursement less than six months from the end of your appointment.
 - Example: if your appointment ends on June 30, 2023, the last allowable day for purchasing or getting reimbursed for tangible property is December 31, 2022.
- There are both spending maximums and purchase frequency caps.

Common Items Ineligible for Reimbursement

- Anything without a proper receipt
- All technology related purchases
- Airfare, hotel, and vehicle rental purchases using points or miles
- Anything purchased with a gift card or gift certificate
- Alcohol, if purchased without food or cost more than the food
- Optional services for a vehicle rental like prepaid refueling and extra insurance (unless required by law)
- Vehicle rentals when it is less economical than ground transportation
- Renting a vehicle larger than a midsize vehicle, unless there is documented proof of three UW Health employees sharing the same vehicle
- No business class or first class airfare, unless deemed medically necessary by the department
- Cruises
- More than one day of travel before and after a domestic business event, regardless of geographic location
- More than two days of travel before and after an international business event
 - Canada and Mexico are not considered international



**There are a lot of rules to navigate,
so when in doubt, reach out to
finance@rad.wisc.edu! 😊**

Radiology Finance Team - Transactional



Leah (Beglije) Krasniqi
Financial Manager
bkrasniqi2@uwhealth.org
[Microsoft Teams Call or Chat](#)

**SMPH (University Funds)
Purchasing and Reimbursement**

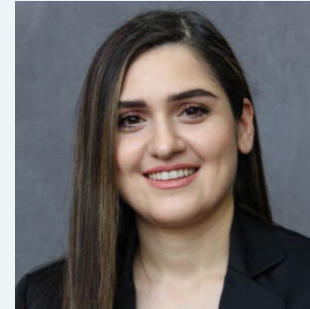


Meara McDonald
Accountant I
[Microsoft Teams Call or Chat](#)



Haiyan Wei
Accountant I
[Microsoft Teams Call or Chat](#)

**UWH (Hospital Funds)
Purchasing and Reimbursement**



Enas Mohrez
Accountant I
[Microsoft Teams Call or Chat](#)



Hideo Sakai
Accountant I
[Microsoft Teams Call or Chat](#)

Please send all inquiries to finance@rad.wisc.edu