

## Educational and Teaching Event Guidelines

The purpose of this document is to provide a guideline for the allocation of Department of Medicine (DoM) funds in support of educational and teaching events involving students, residents and fellows.<sup>1</sup> The DoM recognizes occasional expenses are a part of educational and teaching events; however, as a publicly assisted educational institution the expenses of such events must be moderate in nature.

### Funding

The DoM recognizes educational and teaching events are paid for via a combination of funding sources, such as funds directly from the DoM operating dollars, endowments, expendable funds, and educational unrestricted funds. Department funds refer to any funds held within the DoM regardless of funding source. Budgeting for these occasions should be determined at a Divisional level.

As stated in the [Relations with Industry and the Educational Environment in Undergraduate and Postgraduate Medical Education Standards](#), industry may contribute to postgraduate training events, provided:

- Supports are received in an unrestricted educational grant, ideally involving multiple donors as to avoid any one company developing perception of ownership or influence over the event.
- Contributors are publicly acknowledged.
- All funds are held centrally by the Department and managed by the Program and/or Division Director.
- The industry donor plays no role in selecting educational content (for example, journal club article), choice of speaker(s) or those who attend.
- No quid pro quo is established in any such arrangement.<sup>2</sup>

### Expenditures

The expenditures for educational and teaching events must be appropriate to the nature and purpose of the function being held and be within the budget established by the Division.

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<sup>1</sup> Educational / teaching events include, but are not limited to Journal Clubs and Academic Half Days.

<sup>2</sup> Relationships with Industry and the Educational Environment in Undergraduate and Postgraduate Medical Education, 2013:

[http://www.pgme.utoronto.ca/sites/default/files/public/Policies\\_Guidelines/RelationswithIndustryinMDEducation\\_approved\\_20Feb2013.pdf](http://www.pgme.utoronto.ca/sites/default/files/public/Policies_Guidelines/RelationswithIndustryinMDEducation_approved_20Feb2013.pdf)

## Venues

- Many University of Toronto affiliated locations offer rooms with adequate seating and AV free of charge, such locations should be utilized.
- Venues should be carefully considered and deemed appropriate for an educational and learning environment.
- For special situations, rental venues such as hotels or moderately priced restaurants may be selected.
- To ensure confidentiality, public venues should not be selected<sup>3</sup> when patient or case information is being presented or discussed.

## Food & Beverage

- Meals should not be included in education and teaching events, unless the event is day-long.
- Arrangements for food and drink must be modest, organized by the program and accounted for in the budget.
- Industry representatives must not directly provide food or drink.
- The DoM will not provide reimbursement for alcohol at educational / teaching activities for students, residents and/or fellows. If an educational event precedes a celebration or special event, alcohol may be reimbursed. Please refer to the DoM Alcohol Expense Reimbursement Guidelines.
- Students, residents and fellows should be informed, when possible, if food and beverage will be provided at educational events occurring at standard mealtimes.

## Interactions with Industry Representatives

- As stated in the Relations with Industry and the Educational Environment in Undergraduate and Postgraduate Medical Education standards, students, residents and fellows must be aware of any information provided by Industry Representatives regarding health care related to their products. This information should be considered part of their marketing strategy and should not be relied upon as a resource of health-care information.<sup>4</sup>
- Interactions between trainees and Industry Representatives should be minimal.

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<sup>3</sup> Private rooms in public venues are permitted, provided servers are not moving in and out of the room during the presentation. In public, a case needs to be modified enough to ensure the patient would not recognize themselves.

<sup>4</sup> Relationships with Industry and the Educational Environment in Undergraduate and Postgraduate Medical Education, 2013:  
[http://www.pgme.utoronto.ca/sites/default/files/public/Policies\\_Guidelines/RelationswithIndustryinMDEducation\\_approved\\_20Feb2013.pdf](http://www.pgme.utoronto.ca/sites/default/files/public/Policies_Guidelines/RelationswithIndustryinMDEducation_approved_20Feb2013.pdf)

- Full-time, part-time and adjunct Faculty members should demonstrate good role modeling for trainees when interacting with Industry Representatives.

## Payment of Education Expenses - Process

- To avoid charges to personal credit cards, all events should be invoiced to the DoM whenever possible.
- When invoicing is not possible, incurred expenses should be paid for by the most senior University of Toronto person in attendance.<sup>5</sup>

### Submitting Invoices for Payment:

- Submit the invoice along with the following documents to the DoM:
  1. Clear documentation as to the purpose of rental fees, food and/or beverage expenses.
  2. A list of first and last names of the individuals in attendance.
  3. An invitation email print-out or flyer as supporting documentation.
- Invoices will not be reconciled until after the event has occurred.

### Submitting Receipts for Reimbursement of an Individual:

- Complete the [Personal Expense Reimbursement form](#).
- Sign the form as claimant and submit to the appropriate authority for approval, along with:
  1. All original receipts
    - Credit card statements may be required in cases where proof of payment has not been provided.
    - Itemized original documents detailing purchases and taxes must be provided.
    - Credit card receipts may be used to substantiate gratuities where applicable.
  2. Clear documentation as to the purpose of rental fees, food and/or beverage expenses.
  3. A list of first and last names of the individuals in attendance.
  4. An invitation email print-out or flyer as supporting documentation.
- Once approved by the appropriate authority, the documentation will be forwarded to the DoM's finance team for processing.
- After the reimbursement has been entered into the system you will receive a cheque within 2 – 4 weeks.

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<sup>5</sup> <http://finance.utoronto.ca/policies/gtfm/travel-and-other-reimbursable-expenses/travel-and-other-reimbursable-expenses-policies-and-guidelines/#hospitality>

- The cheque will be delivered to the address indicated on the reimbursement form.
- Direct deposit will be arranged for active employees who are on the U of T payroll system.

*\*The DoM may request proof of authorization from the designated senior faculty member.*

## Helpful Resources

- [Relationships with Industry and the Educational Environment in Undergraduate and Postgraduate Medical Education, 2013](#)
- [Department of Medicine, Alcohol Expense Reimbursement](#)
- [University of Toronto, Financial Services, Guidelines for Travel and Other Reimbursement Expenses – Hospitality](#)