Family Medicine and Community Health
Business Expense Allowance “BEA” Policy
for non-clinical faculty
(Drafted based on Medical School BEA policy for clinical faculty)

Fiscal Year 2020

Scope
This policy applies to UMN (University of Minnesota) non-clinical faculty.

The Business Expense Allowance (“BEA”) supports continuing professional development and maintenance of professional activity for UMN non-clinical faculty. The following policy outlines eligibility, appropriate use and the amount of funding provided for these activities.

Eligibility and Calculation of Amount

Providers who meet the below criteria are eligible for the following BEA amount:

<table>
<thead>
<tr>
<th>Paid FTE (Total compensated work effort*)</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>66% – 100% Total FTE</td>
<td>$5,000</td>
</tr>
<tr>
<td>20% - 65% Total FTE</td>
<td>$2,500</td>
</tr>
<tr>
<td>0% - 19% Total FTE</td>
<td>$  0</td>
</tr>
</tbody>
</table>

*note this may differ from appointments recorded in human resources systems

BEA funds are allocated on July 1 of each year into individually-managed BEA accounts.

Eligible faculty starting employment during the fiscal year will receive a prorated BEA allocation based on their date of hire. For example, a 1.0 FTE provider starting on any date in November will receive 8/12 ($3,333) upon first day of employment. These employees will be eligible for a full allocation on July 1 of the following year.

On a case by case basis, a Department Head may provide an additional BEA allocation, to an individual faculty member, from University/Medical School academic funds (e.g. UMF funds). An example is to provide funds for a faculty member to travel to a conference to present a paper. This provision is not intended to be an authorization for an across the board increase in BEA funds for all faculty in the department.

All BEA funding is subject to continued compliance with all policies of the University of Minnesota.

Allowable Expenses
Allowable BEA expenses include, but are not limited to:

- Travel expenses and conference fees for professional development
- Books, journals, and subscriptions
- Professional memberships
- Continuing Medical Education courses
• Abstract and manuscript fees
• Publication fees and page charges
• Software (the Office of General Counsel must review software terms and agreements prior to purchase);
• Any second computer – including Desktops, Tablets and or Laptops -  subject to the following:
  o Must be used primarily to the benefit of the University of Minnesota.
  o Must be purchased from University of Minnesota HST (Health Sciences Technology)-IS and will remain the property of these organizations
  o One device purchased per year.
• Other expenses that qualify as business related expenses as promulgated by state and federal laws and codified by University policy.

Allowable expenses must comply with UMN reimbursement expense policies.

All expenses must be submitted within 60 days of when expenses are paid or incurred. If submitted after this date, the department may elect to not reimburse or to tax the reimbursement (per IRS and University guidelines).

Unallowable Expenses
Unallowable expenses include, but are not limited to:
• Cell phone or PDA purchases (including accessories) or monthly access or usage charges
• Clothing
• Funds cannot be used to support any other person. Funds are non-transferrable and can only be used on expenses related to the faculty member receiving the funds.
• University of Minnesota Campus Club dues
• Employee-to-employee business meals
• Alumni memberships
• Charitable or voluntary philanthropic donations
• Tablets/laptops not purchased from University of Minnesota HST-IS
• Lab supplies or repair maintenance

Unused Funds
Faculty are allowed to carryforward up to one year of BEA allocation. Therefore, the maximum allowable unused account balance at any time is equal to two times the annual allocation. For example, a 0.75 eligible FTE is limited to a $10,000 balance ($5,000 for the current year, + $5,000 carryforward). This excludes any additional amounts provided by department from academic funds.

Any unused funds in excess of two times the annual allocation are forfeited on June 30 of each fiscal year.
Faculty who wish to use BEA funds after announcing their resignation must obtain pre-approval from the department head or their delegate.

**Other Required Clinical Practice Expenses**

Certain expenses required for clinical practice, as deemed necessary by the department head, will be reimbursed or paid by the department separate from BEA, beginning July 1, 2019.

**Related Policies**

University Business Policy
Continuing Education Allowance for Advanced Practice Providers Policy

*The policy is subject to change at any time based on University of Minnesota institution-wide business expense allowance policies.*