



CME Travel and Expense Management Tips

Without the right system and procedures in place, accurately tracking ongoing CME spend is a complicated process—from knowing what's already been spent to ensuring the funds are used in an appropriate way. Charting costs, managing compliance and avoiding "surprise" reimbursement requests, can feel like a full-time job for many travel managers.



1. Create a fair and sensible expense policy.

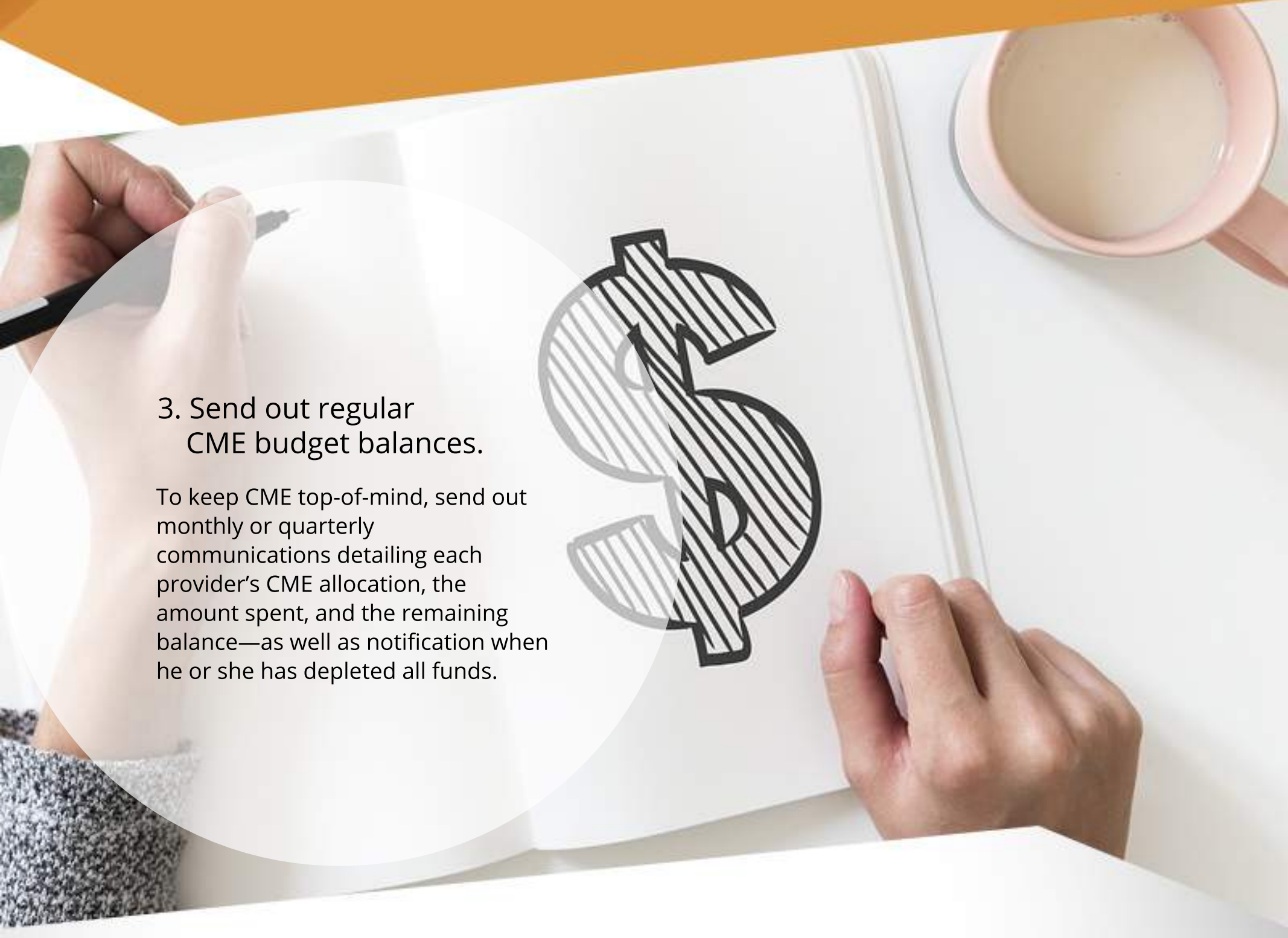
It doesn't have to be a long and complex document; just something that clearly explains what your organization considers legitimate CME expense. For example, are flights or meals for spouses covered? Are there limitations on types of beverages approved? What are the approved uses of the funds?

Also, consider inviting employees to participate in creating the policy. They'll bring good ideas, and feel they "own" a piece of the final result.



2. Put technology tools in place to make CME compliance easier.

The easier you make it for busy physicians, nurses and allied providers to book travel within guidelines and compared prices, the better success you'll have. Tools like TripLink open booking or Price-to-Beat enable CME travelers to choose lower rates or book within policy without clicking from site-to-site or screen-to-screen.



3. Send out regular CME budget balances.

To keep CME top-of-mind, send out monthly or quarterly communications detailing each provider's CME allocation, the amount spent, and the remaining balance—as well as notification when he or she has depleted all funds.

4. Create a CME audit plan to maintain insight and control.

An audit plan will ensure that money is being spent accordingly to the pre-established CMR guidelines. Identify what you're looking for and the response to CME expenses that divert from the pre-established guidelines.

Concur offers both automating and human-based auditing services based on your established policies to ensure CME expenses are appropriate and within your guidelines (like not allowing charges for alcohol).



5. Maintain visibility even when CME travel is booked outside of your travel system.

One of the biggest challenges of CME travel is that many conferences require attendees to book through the event's hotel website. In fact, Global Business Travel Association (GBTA) estimates that between 40-50% of hotels booked currently fall into this direct-booking category.

6. Make filing CME expense reports easy for your providers.

Your providers, like you, are busy people. So, it comes as no surprise that there's often a lag time between the expense report, receipts and supporting paperwork make it to processing.

7. New CME can be lower cost

The good news from a financial perspective, say physicians and other CME experts: Some of the most effective learning opportunities are coming from lower cost, informal and often online channels. And even in the live world of medical conferences, there are ways to stretch a CME budget.



8. Get involved

Imparting new research information quickly is better suited to more didactic teaching styles, for example, and to learning through face-to-face interaction with colleagues is still valuable, experts say.

9. Don't go all-in for online

Online education can certainly save costs on airfare, hotels and restaurants, and evidence suggests younger generations tend to prefer online to live meetings anyway. But having the ability to engage in impromptu conversations around the buffet line can't be overlooked as a way to boost the perceived value of attending a conference.

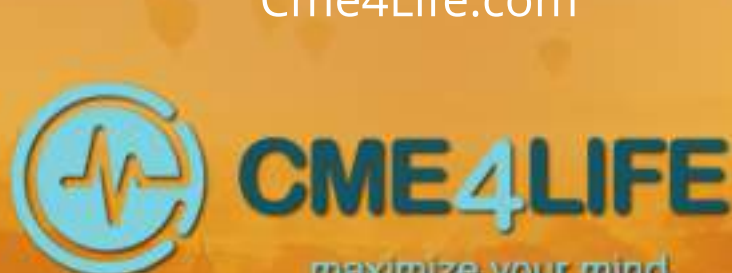


10. One for the team

Increasingly, experts say, physicians are evaluating CME as it relates to an overall practice. Some of the newest courses, for example, involve teams of nurses, physician assistants, pharmacy professionals and doctors. Coursework centers on, among other things, how to function better as professionals.



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