Stanford MEDICINE | Health Care

GME House Staff Reimbursements Step by Step Guideline & FAQs

March 2024 v7

Step by Step Guideline

Guidelines

- Effective July 1, 2023 House Staff reimbursements must be made using Concur.
- To be eligible for license reimbursement, the license sought must be one that is required during the term of the Resident's/Fellow's active employment with SHC.
- Within thirty (30) calendar days of union ratification, House Staff may submit documentation for reimbursement of costs for new or renewed license or Step III exam fees incurred on or after the House Staff start date for the 2023 – 2024 Academic Year.
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- In no event shall any reimbursement be provided after separation from employment.
- For the purpose of this Agreement, an academic year begins on July 1 & ends on June 30.
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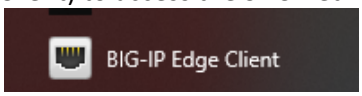
Accessing Concur

- To access Concur, House Staff will want to be on a SHC Computer, either a department/team computer or a SHC laptop assigned exclusively to you.
- If House Staff is outside of the hospital's SHC Network & on a SHC Laptop, they will want to use VPN (Big-IP Edge Client) to access the SHC Network.



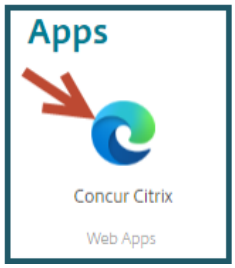
- House Staff will need to be signed into the SHC Network.

If you are having problems accessing Concur, don't wait call SHC IT 24/7 for assistance to access Concur 650 723-3333.

Logging into Concur via CITRIX:

Even if the House Staff has tried using Citrix before, they need to double check the following steps & link below:

- Use this LINK https://citrix.stanfordmed.org/ for accessing CITRIX
- Enter your SHC SID # & SHC Network Password
- Once on the CITRIX dashboard
- Click on the Magnifying Glass located on the upper right-hand corner
- Type CONCUR
- Click on the CONCUR CITRIX icon
- Your Concur account should open



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When Submitting your Expense Report

On the Expense Report, the Cost Center selection is defaulted to an invalid (to you in Concur) Cost Center.
House Staff must manually change the Cost Center field to be **82101** (DEPT OF GRADUATE MEDICAL EDUC) by taking the following steps:

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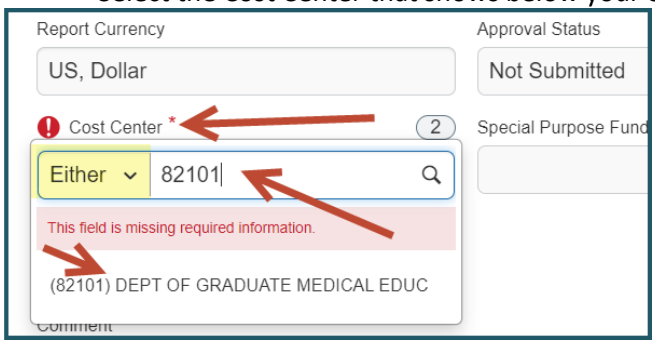
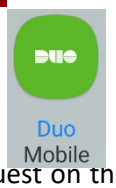


On the Concur Mobile Guidelines:

- Download **DUO Mobile App**



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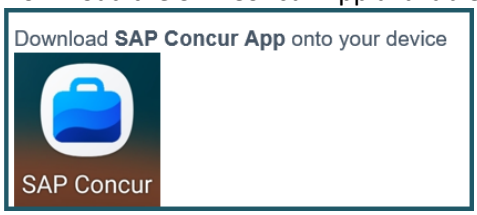
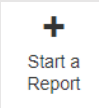
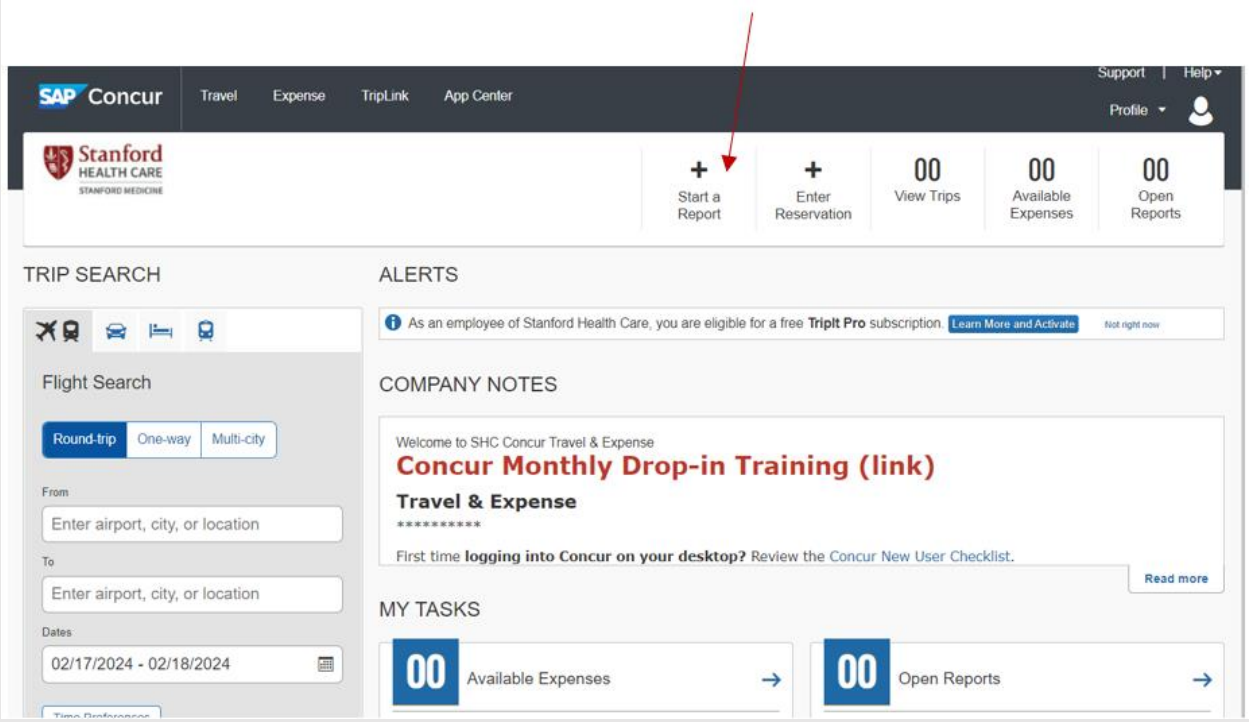
- Download the SAP Concur App available for both iPhone & Android phones



- Open SAP Concur App
- Field "Username, verified email address, or SSO code" = Enter: 3E9RDA (Case Sensitive! Please Type in the Code)
- Click NEXT button
- Click on SIGN IN WITH STANFORD HEALTHCARE - AZURE (the option on the bottom)
- There should be an option of your "SID@stanfordhealthcare.org" - Click on that
  - OR if it's not there, Enter your SHC: SID#@stanfordhealthcare.org
- On the screen that says "sign in with your organizational account"
  - in the bottom box enter your SHC NETWORK PASSWORD
  - Click on the SIGN IN button at the bottom
- The Duo App authentication will pop up next
  - Select SEND ME A PUSH or CALL ME
- Take Duo Action (Accept Push or Press 1)
- Tap the prior screen (in green text at the bottom of the screen, says "success logging you in")
- Click the Continue button located on the right side of the Concur's screen
- Will see "Authenticating"
- Concur will Open.

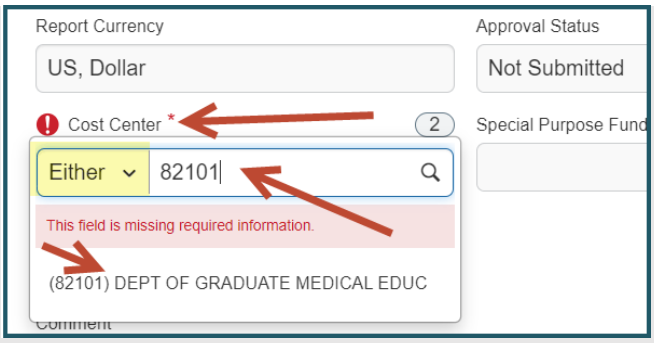
Step by step guidelines to set up a reimbursement:

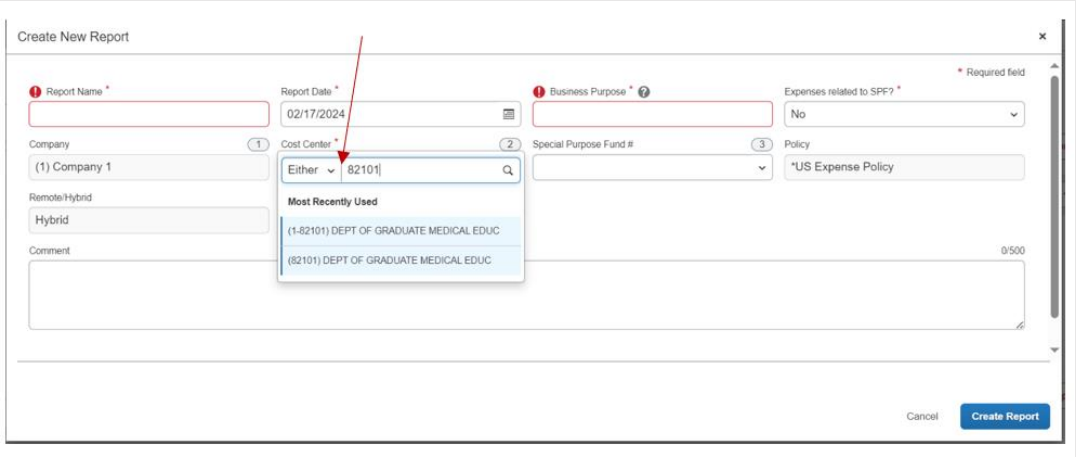
- Click on 



On the Creat New Report page complete all the tabs with a red *

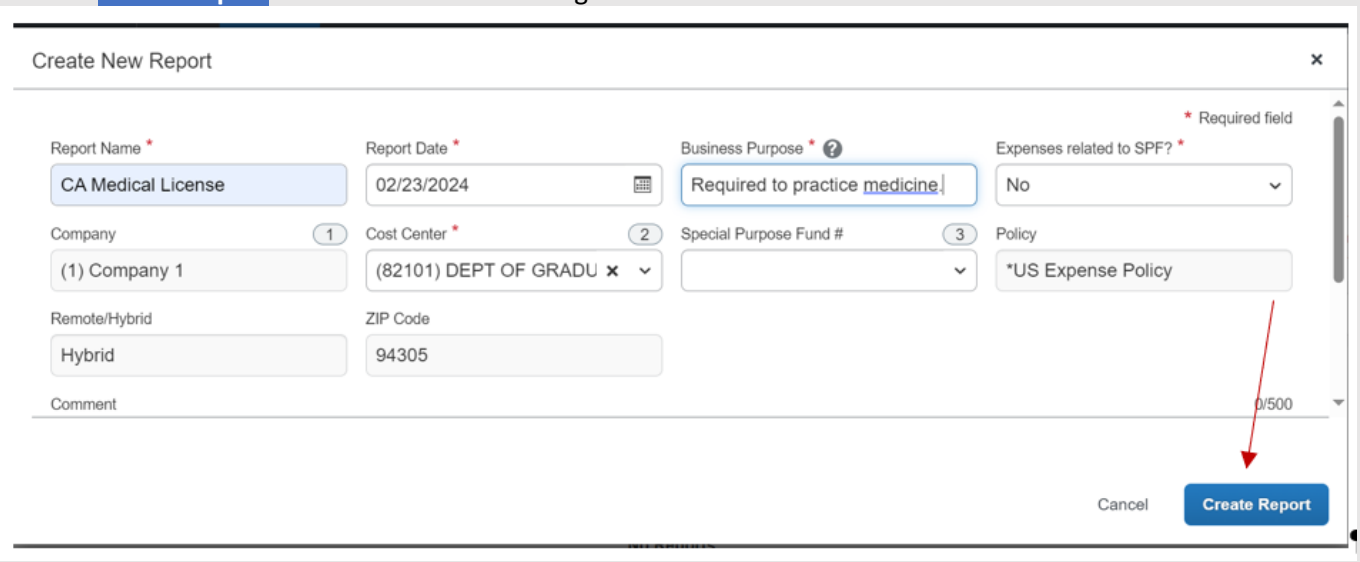
Report Name:	Options are: 1. **CA Medical License** 2. **DEA** 3. **Step 3 Exam**
Report Date	Auto auto fills to the **date you are creating your request**
Business Purpose:	• **Type 1 of the options below:** 1. **Required to practice medicine/see patients** for all CA Medical License variations: ○ PTL ○ Transition from PTL to P&S ○ P&S &/or ○ P&S renewals 2. **Required to write prescriptions** for DEA new or renewals 3. **Exam required to obtain CA Medical License** for step 3 exams: ○ USMLE or ○ NBOME
Expenses related to SPF	Auto fills to **NO**
Cost Center	• House Staff must manually change the Cost Center field to **82101 (DEPT OF GRADU MEDICAL EDUC)** by taking the following steps: ○ X Out (delete) the current Cost Center ○ Change the small search drop down on the left to "**Either**" ○ Type in **82101**, press enter ○ Select the Cost Center that shows below your entry





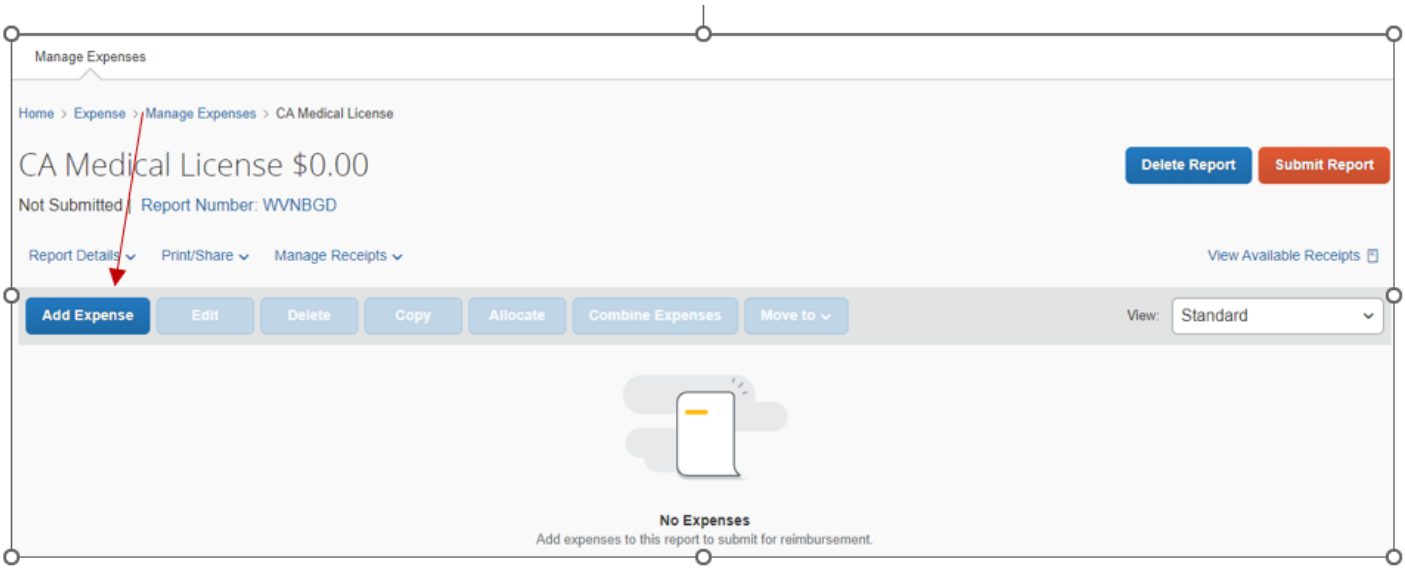
Special Purpose Fund #-	**Leave blank**
Policy	Auto fills to **US Expense Policy**
Comments	House Staff can add additional comments if necessary

- Click on **Create Report** located on the bottom right box



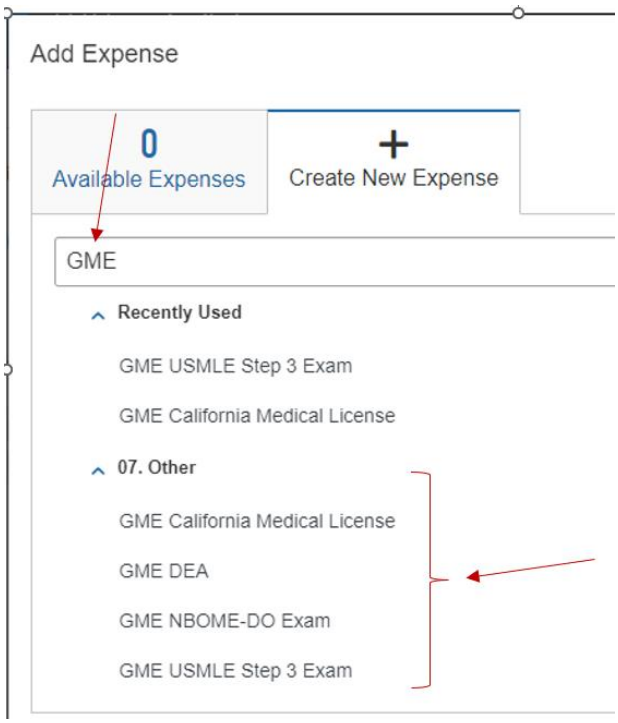
On the Expense-Manage Expenses page

- Click on **Add Expense** tab



On the Add Expense page

- Type **GME** on the tab search for an expsnes type to get your options to **click on your choice of expense**:
  1. **GME California Medical License**
  2. **GME DEA**
  3. **GME NBOME-DO Exam**
  4. **GME USMLE Step 3 Exam**



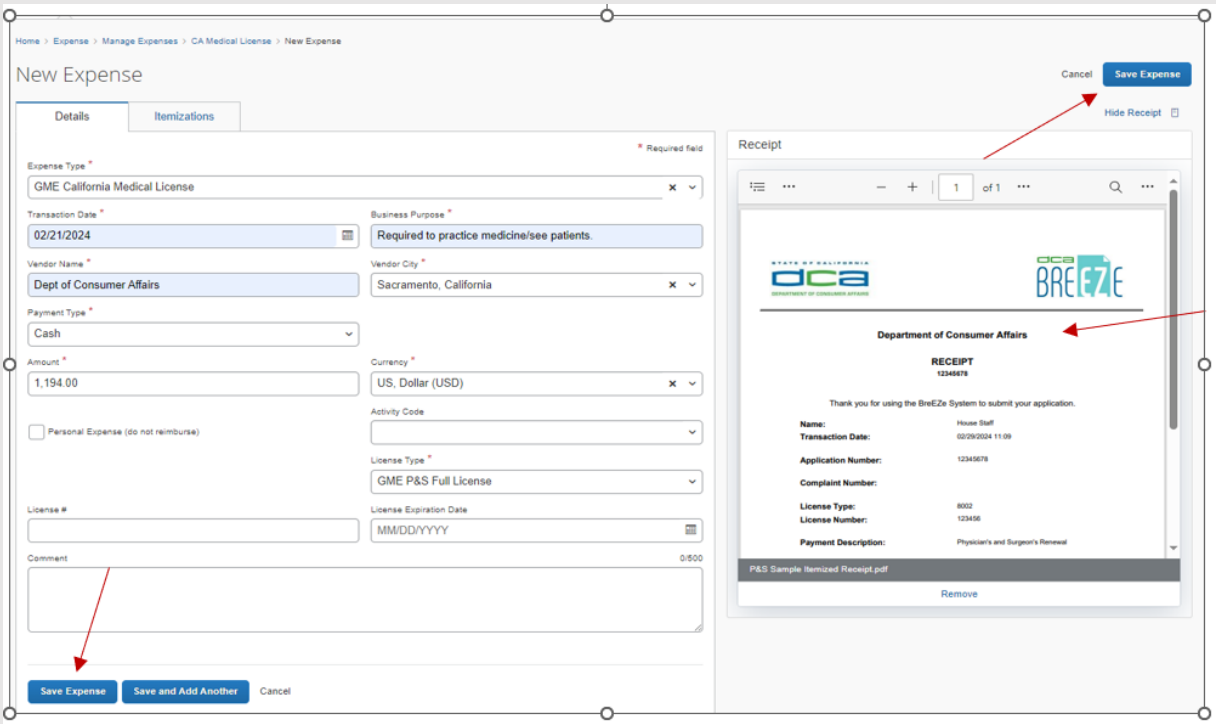
On the New Expense page-House Staff is to complete items listed with red *

Expense Type	Auto fill **to match you expense type** from the previous page
Transaction Date	**Type date** as it appears on your itemized receipt. An itemized receipt is a receipt from the vendor showing: a. Name of the establishment b. Date of service c. Items paid for d. Amount paid
Business Purpose	• Same as before-**type 1 of the options below:** 1. **Required to practice medicine/see patients** for all CA Medical License variations: ○ PTL ○ Transition from PTL to P&S ○ P&S &/or

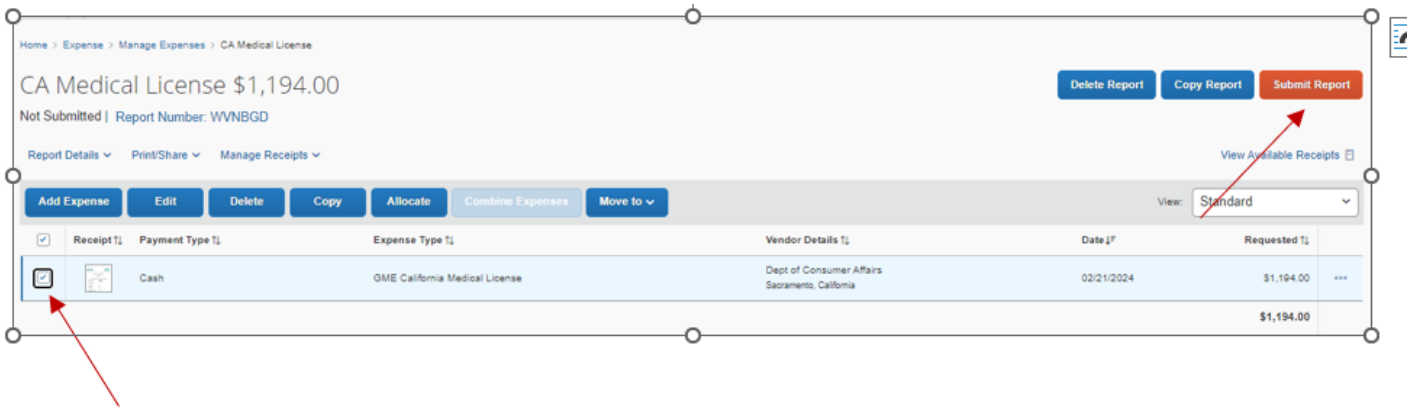
- P&S renewals
2. **Required to write prescriptions** for DEA new or renewals
3. **Exam required to obtain CA Medical License** for step 3 exams:
   - USMLE or
   - NBOME

Vendor name	**Type name** as it appears on your itemezied receipt
Vendor City	**Type city** as it appears on your itemized receipt
Payment Type	Auto fills to **Cash** even if you paid via check or CC
Amount	**Type in amount as it appears on your itemized receipt**
Currency	Auto fills to **US, Dollar (USD)**
Personal Expense	**Leave blank**-Do NOT check box
License Type	**Click on the appropriate CA Medical License charge option**: 1. GME Initial CML-PTL Fee 2. GME PTL Transition to P&S License 3. GME P&S Full License 4. GME P&S License Renewal 5. GME 1st portion-Osteopathic (DO) 6. GME 2nd portion Osteopathic (DO) 7. GME P&S Osteopathic License renewal (DO) • **DEA charges** can be either for initial or renewal DEA-Does not need to be listed • **Step 3 charges** can be either for NBOME or USMLE-Does not need to be listed
Activity Code	**Leave blank**
License or DEA #	Provide details if you are in possession of your License or DEA # otherwise leave blank
License or DEA Expiratin Date	Provide details if you are in possession of your License or DEA # otherwise leave blank
Comments	House Staff can add additional comments if necessary

- **Click on Add Receipt** to the right of your screen to uploace a copy of your receipt in 1 of these formats: png, .jpg, pdf or, tif. For additional assistance with uploading your itemized receipt visit:
  - https://community.concur.com/t5/Support-and-FAQs/How-Do-I-Email-Receipts-to-SAP-Concur/ba-p/16749
  - https://community.concur.com/t5/Support-and-FAQs/How-Do-I-Verify-Email-Addresses-on-My-SAP-Concur-Profile/ba-p/22192
- **Click on Save Expense** located on the top right or bottom left



- **Check the reimbursement item in your qeue** & hit Submit Report located on the top right



On the Manage Expenses page

User Electronic Agreement

Read the content, scroll down to click on Accept & Submit button

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true & accurate accounting of expenses incurred to support official business for SHC
2. I have not claimed any personal & unallowable expenses
3. I have not claimed any expenses incurred by anyone else other than myself
4. I have submitted & attached all required receipts to this request
5. I have not requested & received, nor will I request & receive, reimbursement from any other source(s) for expenses claimed on this request
6. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed, I agree to assume responsibility & repay SHC in full for those expenses
7. I understand that any false claims on this request may result to disciplinary action, including termination of employment with SHC
8. Any portion of my expenses funded by a Special Purpose Fund are legitimate expenses as defined under the provisions of the fund
9. I have read the SHC Travel & Expense policy & understand that any claims not allowed under the policy would require exception approval by the VP Controller or CFO.

- **Scroll down to click on** Accept & Continue

On Report Total page

Review submission/s

Click on Submit Report located on upper right

Repot Status. Review & click to close

Automatic confirmation message of report submitted appears on your screen.

- **Click** on **Close**

- Although House Staff can submit multiple reimbursements on the same report, it is recommended that they do not combine because if something is incorrect in 1 reimbursement, the entire report will be returned.

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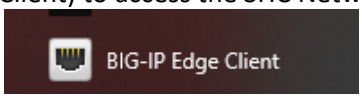

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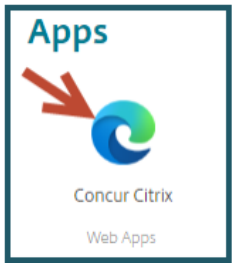

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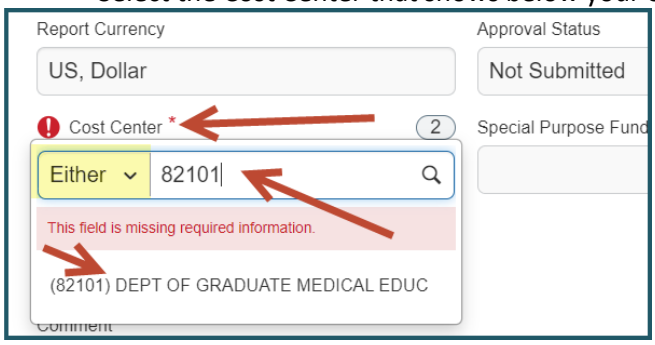

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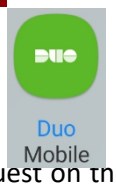

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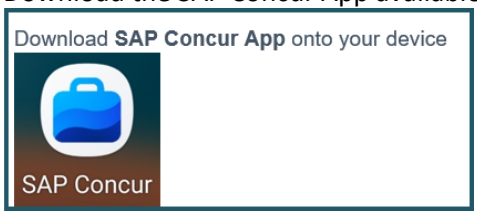

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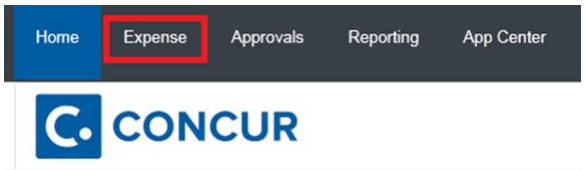
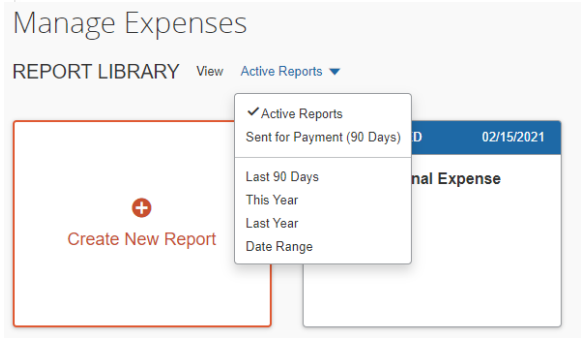
Copy Expenses from A Previous Expense Report to A New Expense Report

1. On the Concur homepage, click on **Expense**



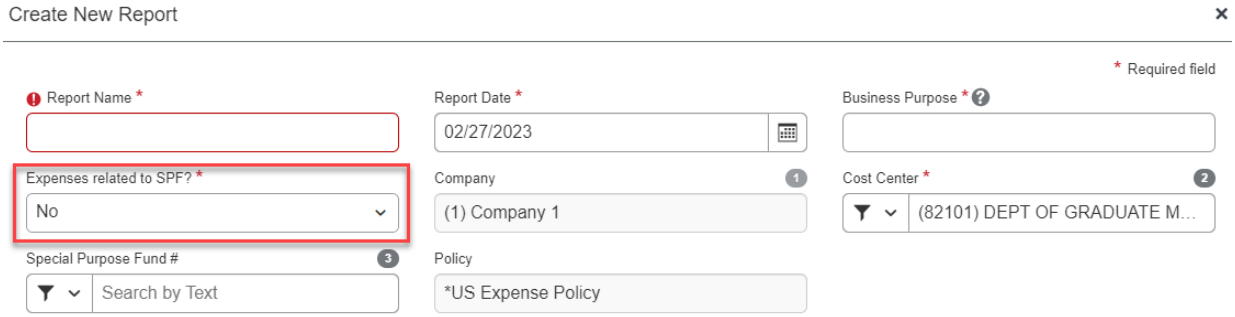
2. Click on **Active Reports**



3. Select the desired expense report to copy
4. Fill in the fields under the **Copy Report** section
5. Click **OK**

On My Expense Report Header, What Are Expenses Related to SPF?

The GME House Staff reimbursements do not fall under Special Purpose Funds (SPF) which are restricted funds available for specific SHC business purposes as defined by donors. The default answer is **No** for GME house staff.



Print my Expense Report

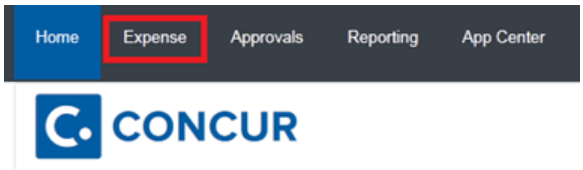
1. Open your expense report, click the **Print/Share** menu, & select the appropriate print option.
   a. To print the fax cover page, select Fax Receipt Cover Page.
   b. To print the detailed report, select Detailed Report.
   c. To print the report, click Print.

Correct & Resubmit a Returned Approver Expense

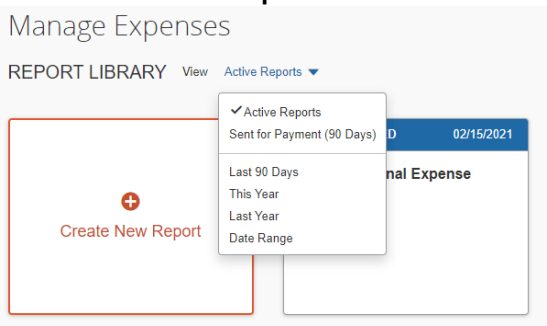
1. Click the **report name** (link) to open the report.
2. **Make** the requested changes.
3. Click **Submit Report**.

As a Submitter, Where Can I Find Expense Reports I Submitted in The Past?

1. On the Concur homepage, click on **Expense**.



2. Click on **Active Reports**.



3. Select desired period for your previous report.

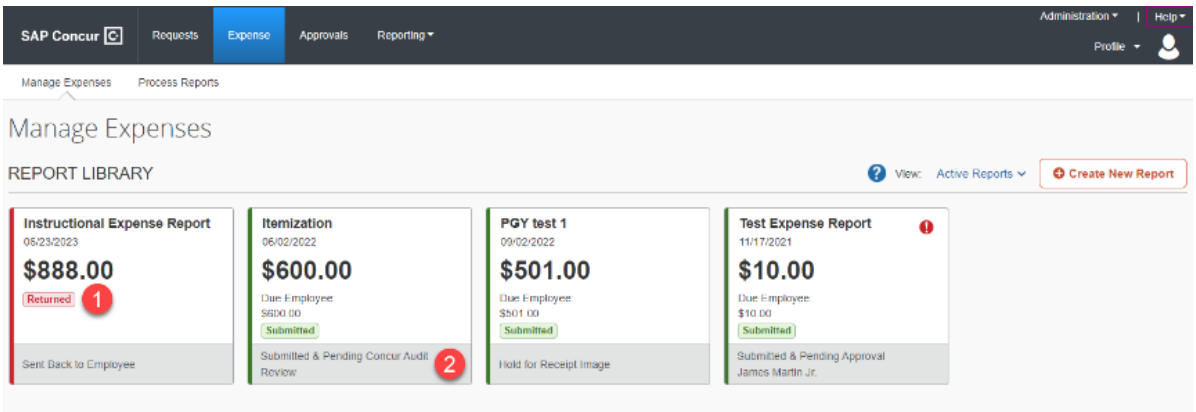
When & How Will I Be Reimbursed?

In the Concur system, email notifications will be provided along each step of the approval process. You can expect to see an approval message at each step – Concur Audit, Manager Approval, & Processing.

In this process, you may see a status (Not Paid) which may be confusing. This is a systemic notation that means our payroll team has not yet processed the reimbursement.

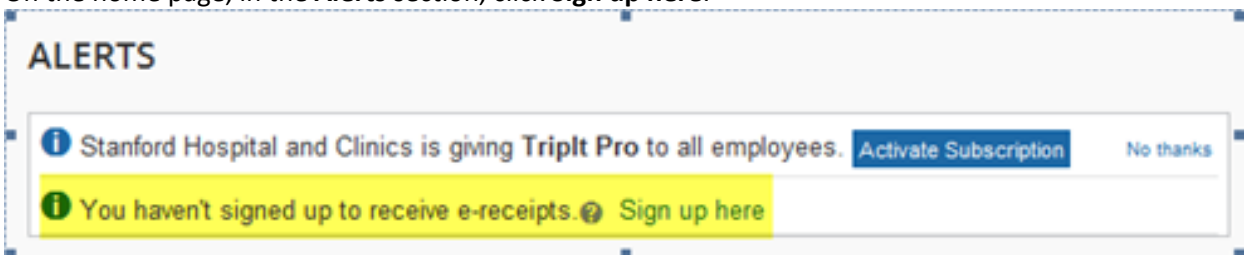
In addition to email notifications, all House Staff can confirm their current report status by logging into Concur. From there, House Staff can observe the current status of their report in the Expense screen. The following information can be observed in the Expense screen.

1. Report Status
2. Pending action



How to Sign Up for E-Receipts:

1. On the home page, in the **Alerts** section, click **Sign up here**.



2. Click **E-Receipt Activation**.

E-Receipt Activation

Enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers!

Click here to enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers!

E-Receipt Activation

Once you complete the e-receipt activation, the e-receipts generated by your transaction with a participating supplier will be automatically collected and matched with your itineraries and expense reports. You can access and print these e-receipts at any time from your Trip Library. If your company uses Expense, then your e-receipts will be automatically matched with your itineraries and expense reports, as applicable, so you can avoid keying in folio data and submitting paper receipts for your expense reports. Participating suppliers of our e-receipt program are identified by our icon during the online booking process:

3. Click **I Accept**.

Note: As you create your expense reports, you will see the e-receipt icon next to any transactions that have an e-receipt. You can click the icon to view the e-receipt. An important feature with E-receipts is that they automatically link & match up to the expense report line items in Concur.

What is Receipt Store?

The Receipt Store feature allows House Staff to associate receipt images with specific expense entries. The ability to drag or upload receipt images within the Receipt Store is turned on by default. House Staff must verify their Stanford email address in Concur to activate the option to email receipt images to Concur.

How Do I Access the Receipt Store?

To access the Receipt Store, House Staff first have to sign up for the service. Follow these steps to complete this process:

1. Expense > Manage Expenses > Available Receipts
2. Click on the gray Instructions button on the right
3. Enter your applicable Stanford e-mail address.

House Staff will then receive a verification code via e-mail. Once House Staff confirms their information, they are ready to use the Receipt Store.

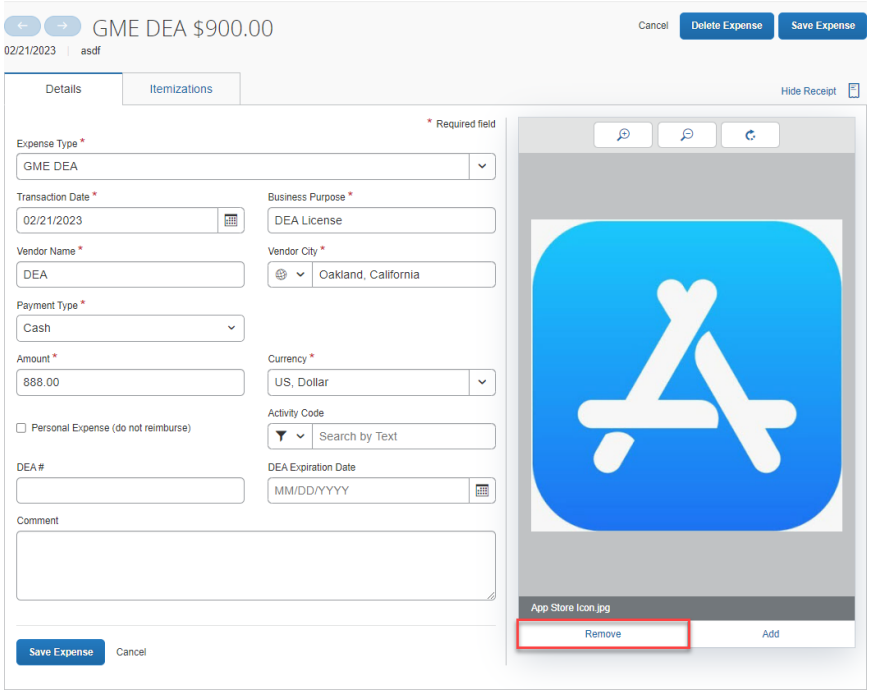
Follow the path listed above to locate the Receipt Store. The Receipt Store is also available within your expense reports, which makes attaching receipts a simple & efficient task.

How do I Verify my Email Address for Receipt Management?

1. Access Profile Settings
2. Select Personal Information
3. Locate Email Address section
4. Add email address as needed
5. Click Verify. You will see a message that an email has been sent to the address being verified
6. Click OK to confirm the verification message
7. Copy the verification code from your email & paste it into the Enter Code field
8. Click OK to complete the verification

How Do I Delete Receipts from My Expense Report?

1. On the Expense Report page, select the desired entry to remove the receipt image
2. Click Remove button



Reimbursement Best Practices:

- House Staff are required to be in possession of a valid CML & DEA Certificate (if applicable) during their entire Stanford training, except:
  - New trainees with P&S &/or PTL licenses who have 180 days after beginning an ACGME/board-approved postgraduate program.
  - Trainees entering a non-ACGME program **do not** have the 180 day grace period to obtain their CA Medical License.
- It is House Staff's responsibility to provide copies of their license & DEA (if applicable) to the GME office.
- House Staff are to submit reimbursement requests upon incurring the charges & no more than 30-days of incurring the charges.
- To confirm receipt of payment, check your paystub by visiting My Payslips – Workday in MyWorkday.com.
- House staff must be in possession of a valid Doctor of Medicine (MD) or Doctor of Osteopathic Medicine (DO) Postgraduate Training License (PTL) or Physician's & Surgeon's (P&S) License throughout their training, except:
  - New/Incoming Interns who have up to 180 days after their appointment start date to obtain their PTL.
  - New/Incoming out of state Stanford ACGME House Staff who have up to 90 days to obtain their P&S License.

  It is their responsibility to provide copies of their license to the GME office.
- House Staff's CML &/or DEA must contain:
  - Issuance & expiration dates
  - License/certificate #
  - Address on record
    Address on record must be complete house staff's Stanford program address & not residence's home or GME address

  House Staff are to provide a copy of their CML & DEA containing the above information to the GME office as soon as they become available to avoid lapse in EPIC access or e-prescribe.
- Electronic prescription privileges are not automatic. House staff in possession of their valid CML, DEA certificate & NPI need to submit an email to the GME Registrar requesting access.
- GME does not reimburse transcription, finger printing or board exam charges.
- To confirm receipt of payment, check your paystub by visiting My Payslips – Workday in MyWorkday.com
- GME does not reimburse transcription, finger printing or board exam charges.

Still have questions Submit a ticket via Ask HR or call (650) 723-4748