

Effective July 1, 2023 Procedural Improvements Using Concur

This procedural improvement:

- Automates & simplifies reimbursements
- Provides visibility to & status notifications
- Provides a single resource
- Eliminates the need for paper expense reports
- Provides faster & more convenient opportunities for reimbursement submissions

Accessing the Concur Expense System

There are multiple ways to access Concur:

On a SHC computer assigned for only your Use:

1. **At Hospital:** [SHC Connect Intranet Home Page – Resources](#) – Click on Concur
2. **At Home on SHC Computer:** Sign into VPN (Big-IP Edge Client) – [SHC Connect Intranet Home Page – Resources](#) – Click on Concur
3. **Your Phone** – Have both the DUO Authentication App and SAP Concur App Installed on your phone – Follow Concur Mobile App Guide

Or

Go to SHC Connect

1. Click on [Citrix Login](#) on upper right box
2. Type your SID for username & your password
3. On the Citrix SHC Apps page, search for Concur
4. Click on Concur Citrix

When remote:

1. Go to citrix.stanfordhealthcare.org
2. Use steps 2-4 shown above

Concur's Mobile App

1. On your personal phone/tablet, download the [SAP Concur](#) mobile application onto your phone/tablet
2. Follow Concur Mobile App Guide.
3. To learn more visit [SHC Concur Mobile FAQs](#)

Getting Help Using Concur

1. Questions on gaining Concur access call SHC IT at (650)723-3333
2. Concur Reimbursement questions Monday - Friday between 9:00-4:00 PM:
 - a. Submit [Ask HR](#) or
 - b. Call (650) 723-4748

SHC's Expense Policy Questions

Please read the [GME House Staff Policies & Procedure, Reimbursement section](#), then submit your reimbursement question/s to [Ask HR](#) or call (650) 723-4748, Monday - Friday between 9:00-4:00 PM.

Can I Exceed the Reasonable Guidelines Under the SHC GME Reimbursement Policy?

When you exceed reasonable guidelines provided under the GME House Staff Reimbursement Policy, the Concur system will prompt you to provide an explanation or justification. Examples:

- USMLE with a yellow or red tab indicates that the amount provided is more than policy guidelines. You will be prompted by Concur to enter the correct amount or an explanation as to why you chose this amount.
- Submitting a reimbursement request that has incurred longer than 60 days but within the current academic year. You will be prompted to Concur to enter an explanation as to why you are submitting late. Your response can be: GME permits reimbursements within one (1) year in the current academic year with the exception for the new/incoming House Staff who must submit their requests after their appointment start date.

When and 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, and 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

The screenshot shows the SAP Concur 'Expense' screen. At the top, there are navigation tabs for 'Requests', 'Expense', 'Approvals', and 'Reporting'. Below the navigation, there are links for 'Manage Expenses' and 'Process Reports'. The main content area is titled 'Manage Expenses' and contains a 'REPORT LIBRARY' section. There are four report cards displayed:

- Instructional Expense Report** (06/23/2023): Amount \$888.00, Status 'Returned' with a red '1' icon, and a note 'Sent Back to Employee'.
- Itemization** (06/02/2022): Amount \$600.00, Status 'Submitted', and a note 'Submitted & Pending Concur Audit Review' with a red '2' icon.
- PGY test 1** (09/02/2022): Amount \$501.00, Status 'Submitted', and a note 'Hold for Receipt Image'.
- Test Expense Report** (11/17/2021): Amount \$10.00, Status 'Submitted', and a note 'Submitted & Pending Approval James Martin Jr.'.

1. Report Status
2. Pending action

Reimbursement Types:

California Medical License (CML): Initial, Transitions & Renewals

- Encompasses Doctor of Medicine (MD) and Doctor of Osteopathic Medicine (DO) Licenses
- New/incoming house staff must submit their reimbursement request after their Stanford appointment start date.
- House staff will not be reimbursed if their CA Medical license has been allowed to lapse or become delinquent.

| Doctor of Medicine (MD) | Doctor of Osteopathic Medicine (DO) |
|--|---|
| <ul style="list-style-type: none"> Postgraduate Training License (PTL) in the amount of \$674.00. | <ul style="list-style-type: none"> DO rates differ than the MD charges. House Staff will be reimbursed for the reasonable amounts within the same guidelines as MD licenses and not to exceed the MD PTL or P&S amounts. DO renewals in the amount of \$447.00. |
| <ul style="list-style-type: none"> Transition from PTL to Physicians & Surgeons (P&S) license in the discounted amount of \$456.50. * | |
| <ul style="list-style-type: none"> Physicians & Surgeons (P&S) license for new Stanford House Staff that are PGY 4 or higher in the amount of \$1,130.50. | |
| <ul style="list-style-type: none"> P&S renewals in the maximum amount of \$910. | |

*GME reimburses trainees' initial transition license fee at 50% reduction. House Staff must be enrolled in one of the following programs:

- Accreditation Council of Graduate Medical Education (ACGME)
- The Royal College of Physicians & Surgeons of Canada (RCPSC)
- The College of Family Physicians of Canada (CFPC)

Step 3 and Associated Notary Charges

- Encompasses United States Medical Licensing Examination (USMLE) Part/Step 3 and National Board of Osteopathic Medical Examiners (NBOME) Complex/Level III.
- Step 3 exam is taken during House Staff's active Stanford appointment.
- Exam is taken during House Staff's PGY I, II or III and prior to House Staff's PTL expiration.
- Reimbursement is made for one (1) sitting.

| United States Medical Licensing Examination (USMLE) Part 3 | National Board of Osteopathic Medical Examiners (NBOME) Complex/Level 3 |
|---|---|
| <ul style="list-style-type: none"> USMLE Part III/Step 3 exam in the amount of \$895.00. | <ul style="list-style-type: none"> NBOME Complex/Level 3 exam in the amount of \$890.00. |
| <ul style="list-style-type: none"> • Notary public charges in the maximum amount of \$15.00. | |

Drug Enforcement Administration (DEA) Certificates-Initial & Renewals:

- The certificate should only be obtained if the Stanford program requires it for the purpose of e-prescribing and it must be obtained while appointed as a GME House Staff.
- All eligible house staff must within two (2) months of eligibility for DEA licensure apply for their DEA.
- Initial DEA certificates applied for on/or after April 1st of the house staff's graduation year will NOT be reimbursed.

| DEA Initial & Renewals |
|---|
| <ul style="list-style-type: none"> • DEA certificates in the amount of \$888.00. |

Reimbursement Best Practices:

- 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 and/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

If this is not available at the time of reimbursement submission, it must be provided to the GME office as soon as they become available to avoid lapse in EPIC access or e-prescribe.

- To avoid paying IRS tax/s, house staff are to submit reimbursement requests within 30-60 days of incurring the expense. The exception is for new/incoming house staff who must submit their request 30-60 days after their Stanford appointment start date.
- 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.

Life Support Training (ACLS and/or BLS) Tuition Charges

GME does not reimburse these charges as these courses are available to GME House Staff at no charge. To learn more visit GME website [Life Support Training Center](#).

Still have questions?

[Ask HR](#)