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.
- Documentation of costs incurred following union ratification for new or renewed License or Step III exam must be submitted within thirty (30) calendar days of the incurred expense.
- New/Incoming House Staff of 2024-2025 academic year must submit their GME reimbursements within thirty (30) days from their SHC contract start date. Thereafter all GME reimbursements must be submitted within thirty (30) days of the incurred charges.
  Example: DEA charge is incurred on 7-1-2024, Concur reimbursement must be submitted no later than 7-30-2024.
- 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.
- Reimbursements cannot be accrued or deferred to a following academic year.

Accessing Concur via computer or Mobile

Visit GME HS Reim Accessing Concur Guidelines posted on the GME website https://med.stanford.edu/gme/housestaff/current/reimbursements.html

Step by step guidelines to set up a reimbursement:

- Click on Start a Report in Concur.

Example:

Concur Monthly Drop-in Training (link)

Welcome to SHC Concur Travel & Expense
Travel & Expense

First time logging into Concur on your desktop? Review the Concur New User Checklist.

Read more

Available Expenses

Open Reports
On the Create 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 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)**. Visit GME HS Reim Cost Center Guidelines posted on the GME website [https://med.stanford.edu/gme/housestaff/current/reimbursements.html](https://med.stanford.edu/gme/housestaff/current/reimbursements.html)

**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

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On the Expense-Manage Expenses page
- Click on **Add Expense** tab
On the Add Expense page

- Type GME on the tab search for an expenses 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 *\**

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Auto fill to match your expense type from the previous page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Date</td>
<td>Type date as it appears on your itemized receipt. An itemized receipt is a receipt from the vendor showing:</td>
</tr>
<tr>
<td></td>
<td>a. Name of the establishment</td>
</tr>
<tr>
<td></td>
<td>b. Date of service</td>
</tr>
<tr>
<td></td>
<td>c. Items paid for</td>
</tr>
<tr>
<td></td>
<td>d. Amount paid</td>
</tr>
</tbody>
</table>

- Business Purpose
  - Same as before-type 1 of the options below:
    1. **Required to practice medicine/see patients** for all CA Medical License variations:
       o PTL
       o Transition from PTL to P&S
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

<table>
<thead>
<tr>
<th>Vendor name</th>
<th>Type name as it appears on your itemized receipt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor City</td>
<td>Type city as it appears on your itemized receipt</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Auto fills to Cash even if you paid via check or CC</td>
</tr>
<tr>
<td>Amount</td>
<td>Type in amount as it appears on your itemized receipt</td>
</tr>
<tr>
<td>Currency</td>
<td>Auto fills to US, Dollar (USD)</td>
</tr>
<tr>
<td>Personal Expense</td>
<td>Leave blank-Do NOT check box</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Leave blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>License or DEA #</td>
<td>Provide details if you are in possession of your License or DEA # otherwise leave blank</td>
</tr>
<tr>
<td>License or DEA Expiration Date</td>
<td>Provide details if you are in possession of your License or DEA # otherwise leave blank</td>
</tr>
<tr>
<td>Comments</td>
<td>House Staff can add additional comments if necessary</td>
</tr>
</tbody>
</table>

- Click on Add Receipt to the right of your screen to upload a copy of your receipt in 1 of these formats: .png, .jpg, pdf or, tif.
• Visit GME HS Reim Uploading Receipts Guidelines, Receipt Guidelines posted on the GME website https://med.stanford.edu/gme/housestaff/current/reimbursements.html or visit:

• Click on Save Expense located on the top right or bottom left.

• Check the reimbursement item in your queue & hit Submit Report located on the top right

On the Manage Expenses page

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
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.
**FAQs**

**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

![Expense Screen Screenshot]

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

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 days 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. Example: DEA charge is incurred on 7-1-2024, Concur reimbursement must be submitted no later than 7-30-2024.
- To confirm receipt of payment, check your paystub by visiting My Payslips – Workday in MyWorkday.com.
- 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
- 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.

Still have questions or if you continue to have problems, don’t wait, submit a ticket via Ask HR or call SHC IT 24/7 for assistance 650 723-3333.