Effective July 1, 2023 Procedural Improvements Using Concur

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]

**Step by Step Expense Submission into Concur**
Items with * must be completed

<table>
<thead>
<tr>
<th>*Required</th>
<th>Steps to take</th>
<th>Actions Required</th>
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</thead>
<tbody>
<tr>
<td>*</td>
<td>Click on</td>
<td>Expense</td>
</tr>
<tr>
<td>*</td>
<td>Click on</td>
<td>+ Create New Report</td>
</tr>
<tr>
<td>*</td>
<td>Report Name</td>
<td>Type 1 of these options:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• CML</td>
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<td>• USMLE</td>
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<td>• USMLE Notary</td>
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<tr>
<td>*</td>
<td>Report Date</td>
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<tr>
<td>Default</td>
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<td>Today’s date</td>
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<tr>
<td>*</td>
<td>Business Purpose</td>
<td>Type Reimbursement &amp; provide detailed description e.g.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• USMLE required to obtain a CA Medical License</td>
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<tr>
<td></td>
<td></td>
<td>• License (PTL, Transition from PTL to P&amp;S or Full P&amp;S) required to practice medicine/see patients</td>
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<tr>
<td></td>
<td></td>
<td>• DEA required to write prescription</td>
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<tr>
<td>Required</td>
<td>Steps to take</td>
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<tr>
<td>*</td>
<td>Expenses related to SPF Default</td>
<td>Auto filled No</td>
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<tr>
<td></td>
<td>Company Default</td>
<td>Auto filled (1) Company 1</td>
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</tbody>
</table>
| *        | Cost Center | • Use the drop down search to choose “Text”, “Code” or “Either”:  
|          |              | • Click on “Either”  
|          |              | • Type 82101 *(82101) DEPT OF GRADUATE MEDICAL EDUC* |
|          |              | House Staff’s CA Medical License, DEA and USMLE charges should only be charged to the GME Cost Center 82101 & not the program |
|          | Special Purpose Fund # | Leave blank |
|          | Policy Default | Auto filled US Expense Policy |
| *        | Click on | Create Report |
| *        | Click on | Add Expense |
| *        | On Add Expense page | Type GME to choose one of the options available:  
|          |              | • GME California Medical License (includes both PTL & P&S)  
|          |              | • GME DEA  
|          |              | • GME USMLE Step 3 Exam  
|          |              | • GME USMLE Notary Reimbursement  
|          |              | • GME NBOME-DO Exam |
|          | On the New Expense page | Details |
| *        | Expense Type | Choose 1 option:  
|          |              | • GME CA Medical License (includes both PTL, Transition & P&S)  
|          |              | • GME DEA  
|          |              | • GME USMLE Step 3 Exam  
|          |              | • GME USMLE Notary  
|          |              | • GME NBOME Level 3 Exam |
| *        | Transaction Date | Use calendar or type Transaction date |
| *        | Business Purpose | Type Reimbursement & provide detailed description e.g.  
|          |              | • USMLE required to obtain a CA Medical License  
|          |              | • License (PTL, Transition from PTL to P&S or Full P&S) required to practice medicine/see patients  
<p>|          |              | • DEA required to e-prescribe. |
| *        | Vendor Name | Type vendor name |
| *        | Vendor City | Type vendor city |
| *        | Payment Type default | Auto filled (leave as Cash even when paid by CC) Cash |
| *        | Amount | Type $amount Amounts cannot exceed max. allowed by GME-for a list of the amount visit the GME website <a href="https://med.stanford.edu/gme/housestaff/current/reimbursements.html">https://med.stanford.edu/gme/housestaff/current/reimbursements.html</a> |
| *        | Currency Default | Auto filled US, Dollar |</p>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity Code</strong>&lt;br&gt;default</td>
<td>Leave <strong>blank</strong></td>
<td></td>
</tr>
</tbody>
</table>

| * | **Type** | Choose 1 option:<br>• GME PTL license fees $674<br>• GME PTL transition to P&S license fees $456.50<br>• GME Full P&S license fees $1,130.50<br>• GME P&S renewal license fees maximum amount of $910.00<br>• GME DO PTL license fees $491.00<br>• GME DO full P&S license fee $625.00<br>• GME DO license renewal $447.00<br>• GME DEA new & renewal $888.00<br>• GME USMLE step 3 $895.00<br>• GME USMLE step 3 notary charge $15.00<br>• GME NBOME level 3 $890.00 |

|  |  | Pls. provide your:<br>• License &/or certificate #<br>• Expiration dates<br>• Upload a copy of your license &/or certificate

License &/or certificate details can be obtained from:<br>**CML:** [BreEZe | MBC (ca.gov)](BreEZe/MBC.ca.gov)<br>**DEA:** [CSA Registration Tools: Login (usdoj.gov)](CSA.Registration.Tools/Login.usdoj.gov)

| * | Click on **Add Receipt**<br>Upload a copy of your receipt in png, .jpg, pdf or, tif. |  |

If you are having problems adding your 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-Email-Receipts-to-SAP-Concur/ba-p/16749) for instructions to email your receipt to Concur.

| * | Click on **Add any comments** |  |

| * | Click on **Save Expense** |  |

**In the new Manage Expense page**

| * | Check the box & click **Submit Report** |  |

| * | User Electronic Agreement. Read the content, scroll down to click on **Accept & Continue** | Review the User Electronic Agreement, scroll down Click on **Accept & Continue** |

| * | On Report Totals page | Review submission/s, click **Submit Report** |

| * | Report Status. Review & click to close | Automatic confirmation message of report submitted appears on your screen. Click on **Close** |
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.

Create New Report

What Are These Exceptions on My Expense Report?

Exceptions on your expense report are either warnings (yellow icons) or errors that need to be cleared (red icons) before you can submit your expense report. To review exceptions:

1. On the Expense Report page, expand the Alerts menu. The Alerts pane opens, which displays all exceptions for the expense report.
2. Click the exception that you want to review. The expense details will appear on the right side of the page.
3. Make the appropriate changes, then click **Save**.

**Print my Expense Report**

1. Open your expense report, click the **Print/Share** menu, and 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**.

   ![Concur homepage](image)

2. Click on **Active Reports**.

   ![Active Reports](image)

3. Select desired period for your previous report.

**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
1. **Report Status**

2. **Pending Action**

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**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**.

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 and match up to the expense report line items in Concur.

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**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.

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**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 and 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 and 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 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?**
Submit a ticket via Ask HR or call (650) 723-4748