

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

Expenses

Accessing the Concur Expense System

There are 3 ways to access Concur:

1. Internet – Type: concur.stanfordhealthcare.org in the internet browser.
2. [SHC Connect](#) (via SHC portal) – Click the Concur Travel & Expense Link through “Connect To” on the SHC portal. You will automatically be logged into your Concur profile.
3. [Concur’s mobile app](#) on your personal phone/tablet – This will require downloading the mobile application onto your phone/tablet. Refer to the Mobile Application Questions section for instructions on how to download the Mobile App.

Getting Help Using Concur

1. Click Help on the home page. In the Help section, you can find specific instructions for:
 - a. Expense Help
 - b. Request Help
2. Submit a Reimbursement Question to [Ask HR](#) or call (650) 723-4748, Monday - Friday between 9:00-4:00 PM.

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:

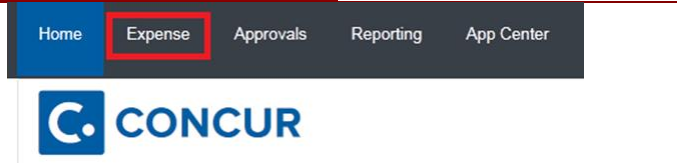
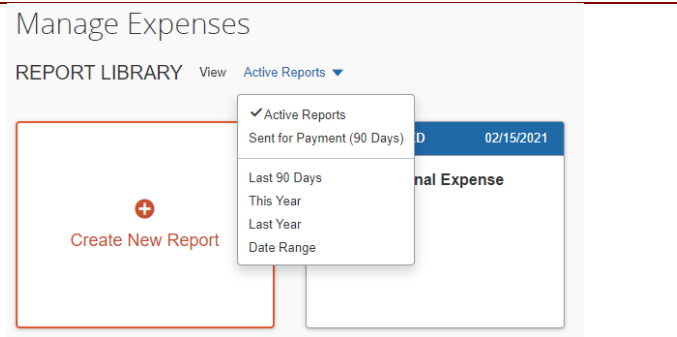
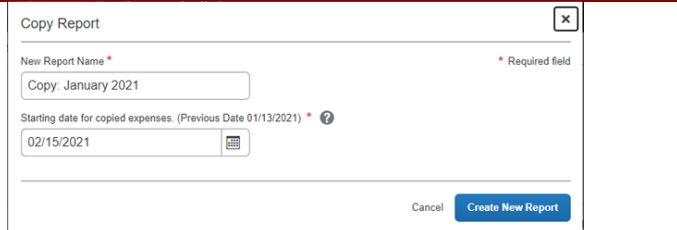
- USMLE with a yellow or red tab indicates that the amount provided is more than policy guidelines. You will be prompted by Concur to enter the correct amount or an explanation as to why you chose this amount.
- Submitting a reimbursement request that has incurred longer than 60 days but within the current 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.

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

*Required	Steps to take	Actions Required
*	Click on	Expense
*	Click on	+ Create New Report
*	Report Name	Type 1 of these options: <ul style="list-style-type: none"> • CML • DEA • USMLE • USMLE Notary
*	Report Date Default	Auto filled Today's date
*	Business Purpose	Type Reimbursement & provide detailed description e.g. <ul style="list-style-type: none"> • PTL License to be able to practice in CA/see patients • DEA certificate to be able to e-prescribe
*	Expenses related to SPF Default	Auto filled No
	Company Default	Auto filled (1) Company 1
*	Cost Center Default	From drop down choose (82101) DEPT OF GRADUATE MEDICAL EDUC
	Special Purpose Fund #	Leave blank
	Policy Default	Auto filled US Expense Policy
*	Click on	Create Report
*	Click on	Add Expense
*	<i>On Add Expense page</i>	Choose 1 option: <ul style="list-style-type: none"> • GME California Medical License (includes both PTL & P&S) • GME DEA • GME USMLE Step 3 Exam • GME NBOME-DO Exam • GME Notary Reimbursement
<i>On the New Expense page Details</i>		
*	Expense Type	Choose 1 option: <ul style="list-style-type: none"> • CA Medical License (includes both PTL & P&S) • DEA (new or renewal) • USMLE Step 3 Exam • NBOME Level 3 Exam • USMLE Notary
*	Transaction Date	Use calendar or type Transaction date
*	Business Purpose	Type detailed reimbursement expense explanation such as: “Required DEA licensure to write prescriptions.”
*	Vendor Name	Type vendor name
*	Vendor City	Type vendor city

*Required	Steps to take	Actions Required				
*	Payment Type default	Auto filled Cash				
*	Amount	Type \$amount				
*	Currency Default	Auto filled US, Dollar				
	Activity Code default	Leave blank				
*	Expense type	Choose 1 option: <ul style="list-style-type: none"> • GME MD PTL license fees \$674 • GME MD PTL transition to P&S license fees \$456.50 • GME MD full P&S license fees \$1,130.50 • GME MD P&S renewal license fees maximum amount of \$910.00 • GME DO PTL license fees \$491.00 • GME DO full P&S license fee \$625.00 • GME DO license renewal \$447.00 • GME DEA new & renewal \$888.00 • GME USMLE step 3 \$895.00 • GME USMLE step 3 notary charge \$15.00 • GME NBOME level 3 \$890.00 				
	If CML or DEA is being reimbursed & you are in possession of your license/certificate details	Pls. provide your: <ul style="list-style-type: none"> • License &/or certificate # • Expiration dates • Upload a copy of your license &/or certificate <p>License &/or certificate details can be obtained from:</p> <table border="1"> <tr> <td>CML:</td> <td>BreEZe MBC (ca.gov)</td> </tr> <tr> <td>DEA:</td> <td>CSA Registration Tools: Login (usdoj.gov)</td> </tr> </table>	CML:	BreEZe MBC (ca.gov)	DEA:	CSA Registration Tools: Login (usdoj.gov)
CML:	BreEZe MBC (ca.gov)					
DEA:	CSA Registration Tools: Login (usdoj.gov)					
*	Click on	Add Receipt Upload a copy of your receipt in png, .jpg, pdf or, tif.				
	Comments	Add any comments				
*	Click on	Save Expense				
<i>In the new Manage Expense page</i>						
*	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				
*	Repot 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 ✕

* Required field

Report Name *	Report Date *	Business Purpose * ?
<input type="text"/>	<input type="text" value="02/27/2023"/>	<input type="text"/>
Expenses related to SPF? *	Company 1	Cost Center * 2
<input type="text" value="No"/>	<input type="text" value="(1) Company 1"/>	<input type="text" value="(82101) DEPT OF GRADUATE M..."/>
Special Purpose Fund # 3	Policy	
<input type="text" value="Search by Text"/>	<input type="text" value="*US Expense Policy"/>	

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.

Expense | GME DEA | 02/21/2023 | \$900.00

! You have exceeded the \$888 limit for GME DEA. [View](#)

3. Make the appropriate changes, then click **Save**.

Print my Expense Report

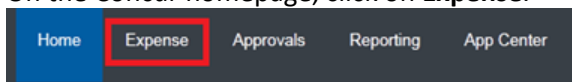
1. Open your expense report, click the **Print/Share** menu, and select the appropriate print option.
 - a. To print the fax cover page, select Fax Receipt Cover Page.
 - b. To print the detailed report, select Detailed Report.
 - c. To print the report, click Print.

Correct & Resubmit a Returned Approver Expense

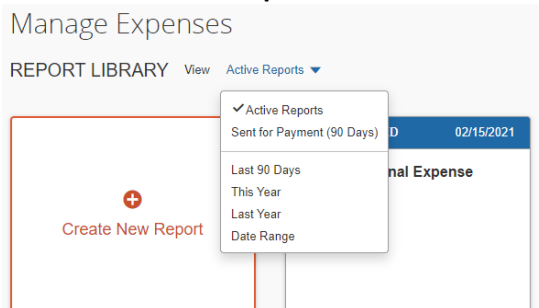
1. Click the **report name** (link) to open the report.
2. **Make** the requested changes.
3. Click **Submit Report**.

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

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



2. Click on **Active Reports**.



3. Select desired period for your previous report.

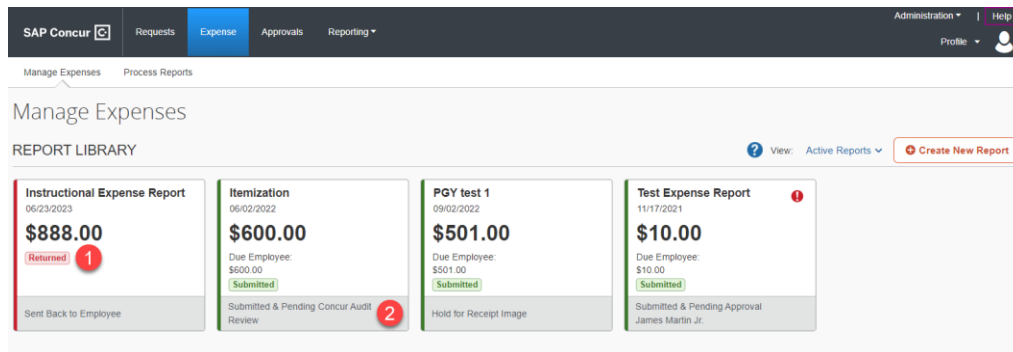
When and How Will I Be Reimbursed?

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

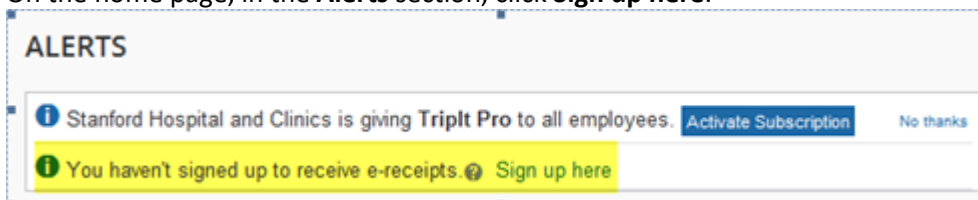


1. Report Status
2. Pending action

Expense Receipts

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 and 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 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

The screenshot shows an expense report entry for 'GME DEA \$900.00' dated 02/21/2023. The form includes fields for Expense Type (GME DEA), Transaction Date (02/21/2023), Business Purpose (DEA License), Vendor Name (DEA), Vendor City (Oakland, California), Payment Type (Cash), Amount (888.00), and Currency (US, Dollar). There is also a checkbox for 'Personal Expense (do not reimburse)', an 'Activity Code' dropdown, and a 'DEA Expiration Date' field. A receipt image of an App Store icon is attached, and a red box highlights the 'Remove' button at the bottom of the receipt preview.

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](#)