Links: **Reimbursement Site**   **Prerequisites**   **Homepage**   **My Approvals Dashboard**   **Approving Tasks**
Submitting a Claim   **My Requests Dashboard**

Prerequisites

Updating Email Address in User Profile	Making sure the email address attached to your SharePoint Account is up to date as this is where all your notifications go.

1. Open a web browser.

2. Enter the URL: https://apps.mednet.med.ubc.ca/reimbursements.

3. Login to SharePoint (if accessing the site externally and not already signed in).

4. Once signed in, click your name on the right top side of the screen and click "About Me" (Figure 2).

5. You will see your email address right below your name. This is the address where you will be receiving all the notifications about your claims. If it looks correct, you can skip the prerequisite section. If you don't see your email address or want to update it, follow step 6.

6. Click "Edit My Profile" below your profile picture (Figure 3).

Figure 1:

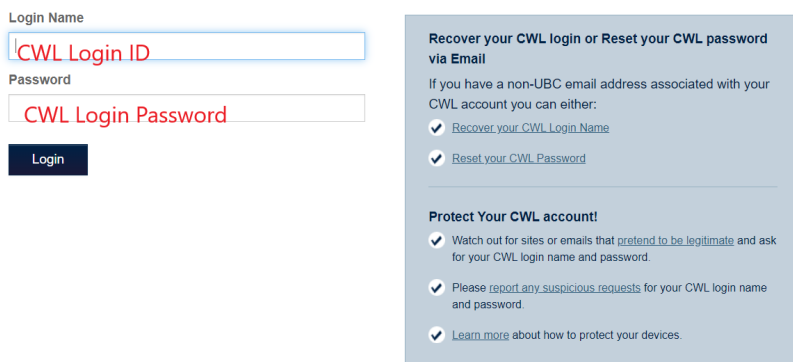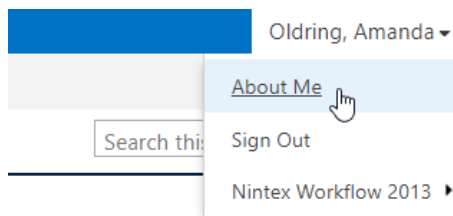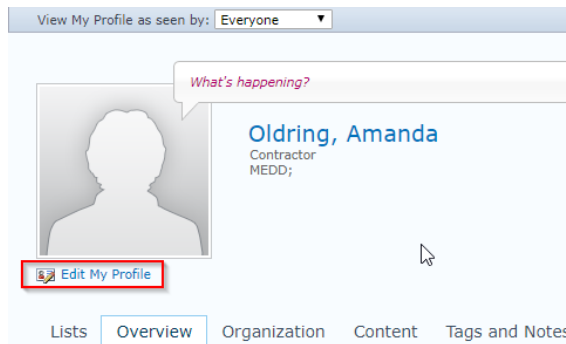## CWL Authentication

Login to continue to MedNet

Login Name

[CWL Login ID]

Password

[CWL Login Password]

[Login]

Recover your CWL login or Reset your CWL password via Email

If you have a non-UBC email address associated with your CWL account you can either:

✔ Recover your CWL Login Name

✔ Reset your CWL Password

Protect Your CWL account!

✔ Watch out for sites or emails that pretend to be legitimate and ask for your CWL login name and password.

✔ Please report any suspicious requests for your CWL login name and password.

✔ Learn more about how to protect your devices.

Figure 2

Oldring, Amanda ▾
About Me
Sign Out
Nintex Workflow 2013 ▸

Search thi[s]

Figure 3

View My Profile as seen by: Everyone ▾

What's happening?

Oldring, Amanda
Contractor
MEDD;

🖉 Edit My Profile

Lists   Overview   Organization   Content   Tags and Notes

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7. Under the Contact Information section, locate "Work email" and type in your email address here.

8. Click "Save and Close" on the top.

Figure 4

Contact Information		Show To
⚠ **Work email**: *	aoldring@softlanding.ca	Everyone
Mobile phone:		Everyone
	This number will be shown on your profile. Also, it will be used for text message (SMS) alerts.	

Homepage

Site Homepage	Looking at the homepage to know where's what

1. Browse to the Reimbursement Site: https://apps.mednet.med.ubc.ca/reimbursements

2. Links for residents (#1) have a **New Requests** link to submit a new claim, **My Requests** dashboard, where the residents can go and check the status of their submitted claims and a **Support** link to find out who to contact if they need any assistance.

3. Supporting Material will direct you to the PGME website that contains documents to support the reimbursement solutions.

4. Links for approvers (#5) contain a **My Approvals** Dashboard which will contain all the pending approval tasks assigned to you as well as a completed approvals and **Contact** link to specify who to contact if assistance is needed.

Figure 5

MedNet

Home   Contact List   UBC Directory   med.ubc.ca

FACULTY OF MEDICINE
MEDNET | Team Site: Resident Reimbursements

3) Link to support documents about the Reimbursement solution

MY REQUESTS   MY APPROVALS   SUPPORTING MATERIAL

Resident Reimbursement Home

1) Links for Residents

2) My Approval Dashboard listing all the pending and completed tasks assigned to you

Residents
New Request
My Requests   4) Link to Homepage
Support

Approvers
My Approvals
Contact

5) Links for approvers

WELCOME TO THE RESIDENT REIMBUSEMENTS SITE

This site is used for the reimbursement of expenses resulting from mandatory rural rotations, academic half-days, community rotations, or course fees.

If the expense type isn't list on the online form and you believe they are eligible for reimbursement, please contact your Program Administrator.

My Approvals Dashboard

My Approvals	Taking a look at all the Approval Tasks assigned to you

2

1. There are two sections under the My Approval Dashboard: **My Approval Tasks** and **My Completed Approvals**.

2. **My Approval Tasks** lists all the pending tasks assigned to you. The **approval task** column will show you what type of task it is: Program, Department or PGME approval task.

   Clicking on the approval task's name will open the task for you.

3. **Related Content** column has a link to the original claim form submitted by the resident. Clicking here will open the task claim form.

4. **My Completed Approvals** section shows all the claims and claim data processed by you grouped by its current status.

Figure 6

Resident Reimbursements > My Approvals

My Approval Tasks

✓	Approval Task		Related Content	Created	Modified
	Department Approval Task ❋	•••	Reimbursement Request	About an hour ago	About an hour ago
	PGME Approval Task ❋	•••	104: Academic Half Day Reimbursement Request	About an hour ago	About an hour ago
	Program Approval Task ❋	•••	Singh, Karandeep #128: Victoria Sites Moving Expenses	About an hour ago	About an hour ago
	Program Approval Task	•••	Yang, Luyi #116: Academic Half Day	5 days ago	5 days ago
	Program Approval Task	•••	Oldring, Amanda #111: Academic Half Day	6 days ago	6 days ago

My Completed Approvals

ID	Resident	Title	Academic Year	Claim Type	Tota
Count= 41					
▷ Decision Status : **Approved** (19)					
▷ Decision Status : **Cancelled** (3)					
◢ Decision Status : **Pending Department Approval** (2)					
Count= 2					
129	☐ Yang, Luyi	Yang, Luyi #129: Mandatory Distributed Rotation ❋	2019-2020	Mandatory Distributed Rotation	$560.0
81	☐ Lythgoe, Luke	Reimbursement Request	2019-2020	Off-Site Callback	$12.0
▷ Decision Status : **Pending PGME Approval** (13)					
▷ Decision Status : **Rejected** (2)					
▷ Decision Status : **Resubmit for Review** (2)					

Approving Tasks

Approval task	Approving/Rejecting a task assigned to you

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When a resident submits a claim, it goes through different approval levels in this order:
Program Admin Approval > Departmental Approval* > PGME Admin approval.

*Departmental approval only happens if there is a department listed for the program in the Approvers List.

1. Looking at a pending task, the heading of the form will specify the approval level of the task: Figure 7 shows a **Program Admin task**. If you are an approver at the departmental level, your tasks will say **Department Approval Task**. Rest of the form looks the same.

2. Clicking the **Claim ID** number (128 in Figure 7) will open the original claim form that the resident submitted in a new browser tab.

   Review the claim including the expense details section.

   If the claim contains all the required information and the claimed expense numbers look good, go back to the approval task and approve it.

   If you want to **modify the claimed expenses**, you can hit the edit button in the ribbon (Figure 8) and start. Enter the approved amount under the adjustment totals section, adding the approved number for the particular expense type.

   For example, the claim in

Figure 7

Figure 8

Figure 9

Figure 9 shows $300 for accommodation. Lets say the maximum a resident's allowed to get reimbursed for accommodation is $250. You will have to enter $250 in the adjusted accommodation box to update the Approved Expenses (Figure 10) box and hit save. Notice how the Approved expenses are $50 less than the claimed expenses now. Hit Save to finish editing.

Now **going back to the task**, when you are approving it, you can add comments mentioning the adjustments made to the claim.

3. The **Recent Approval History** section will show the comments added by the resident when submitting and by approvers when approving/resubmitting for review.

   These comments are sorted to show the newest comments first. Figure 11 shows an example of how the approval History section looks like going through different approvers.

4. The **Sign Off** section is where you will need to provide your input. You can either **approve/reject/cancel** or **resubmit for review**.

5. If a task is resubmitted for review by a **Program Admin**, it goes back to the resident who submitted it. Resident will have to review your

Claim Totals

Travel:	Accomodation:	Course:	Rental:	AH Days:	Claimed Expenses:
$ 95.00	$ 300.00	$ 0.00	$ 0.00	1	$ 395.00

Adjustment Totals

Travel:	Accomodation:	Course:	Rental:	AH Days:	Approved Expenses:
				1	$ 395.00

Sign Off

Figure 10

Claim Totals

Travel:	Accomodation:	Course:	Rental:	AH Days:	Claimed Expenses:
$ 95.00	$ 300.00	$ 0.00	$ 0.00	1	$ 395.00

Adjustment Totals

Travel:	Accomodation:	Course:	Rental:	AH Days:	Approved Expenses:
	250			1	$ 345.00

Figure 11

Recent Approval History

Program Admin (2/18/2020, Singh, Karandeep) - Approved:

PGME Office (2/18/2020, Singh, Karandeep) - Resubmit for Review: Sending back for program approval

Family Practice Office (2/14/2020, Singh, Karandeep) - Approved: Approving claim

Program Admin (2/14/2020, Roggeveen, Anthony) - Approved:

New Request (2/11/2020, Lythgoe, Luke) - Submit: Yes

Figure 12

Sign Off

Decision ○ Approve ● Reject ○ Resubmit for Review ○ Cancel

Comment Location To under Travel not specified

Completed By: Singh, Karandeep   Completed On: 2020-02-18

OK	Cancel

comments, add the missing information and resent it for approval to the program admin. <u>Therefore its important to add accurate comments to these tasks</u>.

6. If a task is resubmitted for review by a **Departmental Approver** on a department task form, it goes back to the Program Admin for review.

7. If a **PGME Admin** resubmits a task for review, they can choose who to send it to: Department or Program level.

8. Figure 12 shows a task rejected with comments. Comments section becomes required unless the task is being approved.

Submitting a Claim

6

New Request	Submitting a new claim in the reimbursement system

1. From the reimbursement homepage, click on **New Request** from the left-hand navigation (Marked as #1 in the homepage screenshot above).

2. Fill out all the fields. The ones marked with * are required fields and you won't be able to Submit your claim without filling these out.

   You can still save the form as a draft and come back and submit it when ready.

3. The **Program**, **To** and **From** fields must be selected from a taxonomy list as per Figure 7.

   To select, you can either start typing into the box and select from one of the suggestions that will appear below, or click on the icon (marked in red in Figure 6).

4. Once you click on the icon, you will see a list of options you can choose from.

   You will have to expand your program type (non-selectable) and double click to select the second level program.

5. Once you select a **Claim Type**, the form will expand, and more fields will appear (Figure 8).

6. Depending upon the claim type, you see different fields i.e. Block, Accommodation, Rental or Course.

Figure 13

Figure 14

Figure 15

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NOTE: if you decide to change the claim type after adding a few expenses, you will need to clear out those expenses before doing that. If the expenses are not cleared out before the claim type is changed, the total claimed expenses calculation will be inaccurate.

7. Travel can be selected from the dropdown with four options: **Car**, **Taxi**, **Bus/Ferry**, **Airfare** or can be left empty if its not part of the claim.

8. If you want to submit multiple expenses in one claim, click **Add new row** to add another Expense Details section.

9. All the receipts can be attached to the claim under the attachment section.

10. The Claim Totals section will add all the expenses from the expense details section and view the total under Claimed Expenses.

11. When the form hasn't been submitted, there is an option to save it as a draft in case you want to comeback to it and add more details.

   After you hit the submit button, the claim is automatically sent for approval to your Department Approver or PGME Approver

To *			Claim End *		
Claim Type *	Victoria Sites Moving Expenses ▾		Year	2019-2020 ▾	
Block	☐☐☐☐☐☐☐☐☐ ☐ ☐ ☐ 1 2 3 4 5 6 7 8 9 10 11 12 13		Email *		
Comments					

Expense Details

Accomodation		Amount	0	CAD ▾	✕
Travel	Select.... ▾	Date		🗓	
Rental		Amount	0	CAD ▾	

➕ Add new row

Attachments   ➕ Add Attachment

Please keep the original receipts for 7 years for audit purpose.

Claim Totals

Travel:	Accomodation:	Course:	Rental:	AH Days:	Claimed Expenses:
$ 0.00	$ 0.00	$ 0.00	$ 0.00	0	$ 0.00

Save as Draft	Submit	Cancel

My Request Dashboard

My Requests	Taking a look at all the claims submitted and non-submitted by you

The My Requests Dashboard is where you will see all the pending and completed claims submitted by you. Three sections under the My Requests Dashboard:

1. My Pending Requests: This section will show you all the requests that are not marked completed or cancelled.

   The claims under this section are grouped based on their Decision Status. To expand a section for a status, click on decision status next to it.

2. My Completed Requests: All the claims that were approved/rejected/cancelled by the approvers will show up under this section.

3. My Requests For Resubmission: The approver can kick back the claim to the resident if he needs more information. Any requests that require more information from you will show up under this section.

   If a claim shows up here, you will need to open the form up and add the missing details and click Save. The missing information should be pointed out in **Approval History** section where all the approver's comments are shown.

Figure 16

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