

## 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

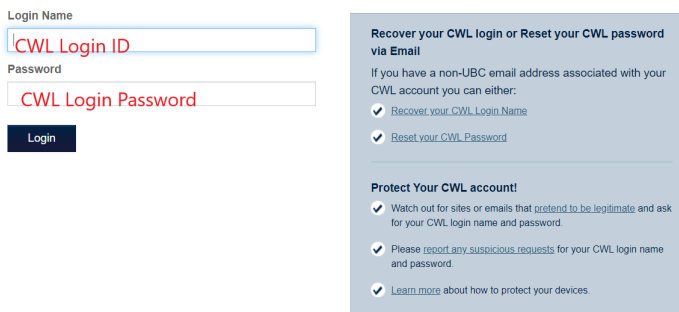


Figure 2

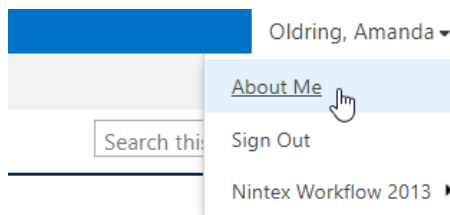
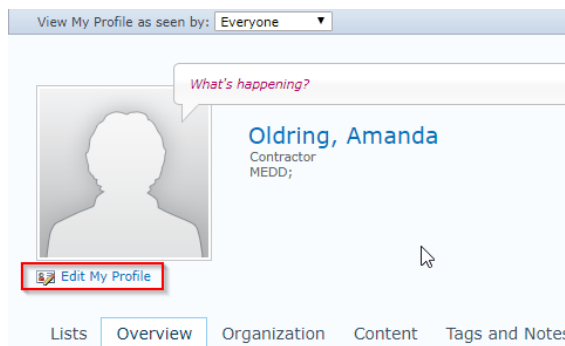


Figure 3



- Under the Contact Information section, locate **Work email** and type in your email address.
- Click **Save and Close** on the top of the form.

Figure 4

Contact Information	Show To
<b>Work email:</b> *	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

- Browse to the Reimbursement Site:  
<https://apps.mednet.med.ubc.ca/reimbursements>.

This is the homepage (#5) of the Reimbursement Solution and this is where you go to submit new claims and track the pending claims.

- Click the **New Request** link (#1) to start a new claim request.
- The **Support Info** page (#4) points out who to contact in case you have any questions. Currently it says to contact your **Program Administrator** (Figure 6)

Figure 5

The screenshot shows the MedNet homepage for the Faculty of Medicine. At the top, there are navigation links for Home, Contact List, UBC Directory, and med.ubc.ca. Below this is the UBC logo and the text 'FACULTY OF MEDICINE MEDNET | Team Site: Resident Reimbursements'. A blue navigation bar contains 'MY REQUESTS' and 'SUPPORTING MATERIAL'. Below the navigation bar is a 'Resident Reimbursement Home' section with a sidebar menu containing 'New Request', 'My Requests', and 'Support'. A main content area on the right says 'WELCOME TO THE RESIDENT REIMBURSEMENTS S' and provides information about the site's purpose and contact instructions. Red callout boxes with arrows point to: 1) 'New Claim Link' (pointing to 'New Request'), 2) 'Link to the My Requests Dashboard' (pointing to 'MY REQUESTS'), 3) 'Link to support documents about the Reimbursement solution' (pointing to 'SUPPORTING MATERIAL'), 4) 'Support Info Page' (pointing to 'Support'), and 5) 'Link to homepage' (pointing to the 'Resident Reimbursement Home' header).

Figure 6

The screenshot shows the 'Support' page. On the left is a sidebar menu with 'Resident Reimbursement Home', 'Residents', 'New Request', 'My Requests', and 'Support' (highlighted). The main content area shows the breadcrumb 'Resident Reimbursements > Residents > Support' and the text: 'For help with this site/questions about resident reimbursements, please contact your Program Administrator.'

## Submitting a New Claim

### 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).

Figure 6

Resident Reimbursements > Resident Reimbursements > New Item



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## Resident Reimbursements Form

### Claim Details

Resident	<input type="text" value="Oldring, Amanda X"/>	Payee	<input type="text"/>
Street *	<input type="text"/>	Unit	<input type="text"/>
City *	<input type="text"/>	Postal Code *	<input type="text"/>
Program *	<input type="text"/>	Employee ID *	<input type="text"/>
From *	<input type="text"/>	Claim Start *	<input type="text"/>
To *	<input type="text"/>	Claim End *	<input type="text"/>
Claim Type *	<input type="text" value="Please select a value..."/>	Year	<input type="text" value="2019-2020"/>
		Email *	<input type="text"/>
Comments <input type="text"/>			
<input type="button" value="Save as Draft"/>		<input type="button" value="Submit"/>	
<input type="button" value="Cancel"/>			

Figure 7

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 8.

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 7).

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 9).

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

### SELECT : ADD TERMS



PGME Programs

- ▶ Anesthesiology, Pharmacology & Therapeutics
- ▶ BCY Site
- ▶ Clinician Investigator Program
- ▶ Dentistry
- ▶ Dermatology & Skin Science
- ▶ Emergency Medicine
- ▶ Family Practice
  - Family Medicine
  - Family Medicine - Abbotsford
  - Family Medicine - Anesthesiology
  - Family Medicine - Chilliwack
  - Family Medicine - Clinician Scholar Program
  - Family Medicine - Coastal

Select >>

Family Medicine - Abbotsford

OK Cancel



Figure 8

**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. Itemized travel expenses by date for easy reference.
- 9. All the receipts must be attached to the claim under the attachment section. Attach Google Map print out if your travel location is not listed.
- 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

The screenshot shows a web form for submitting a reimbursement claim. At the top, there are fields for 'To', 'Claim End', 'Claim Type' (set to 'Victoria Sites Moving Expenses'), 'Year' (set to '2019-2020'), 'Block' (a row of checkboxes numbered 1-13), and 'Email'. Below these is a 'Comments' field. The 'Expense Details' section is a large box containing fields for 'Accommodation', 'Travel' (with a dropdown menu), 'Date', and 'Rental', each with an 'Amount' field and a 'CAD' dropdown. Below this section are two buttons: 'Add new row' and 'Attachments' with an 'Add Attachment' button. A warning message states: 'Please keep the original receipts for 7 years for audit purpose.' Below the warning is a 'Claim Totals' section with a table:

Travel:	Accommodation:	Course:	Rental:	AH Days:	Claimed Expenses:
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0	\$ 0.00

At the bottom of the form are three buttons: 'Save as Draft', 'Submit', and 'Cancel'.



approval to your Program Administrator.

## 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 by approvers.

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.

To open a claim submitted as draft earlier expand the **Not Submitted** section and click on the claim you want to finish (Figure 11). Once the claim is open, **click edit** in the ribbon (Figure 12). After adding all the claim data, **click submit** to send the form for approval

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 return the claim to the resident if he/she needs more information. Any requests that require more information from you will show up under this section.

Figure 9

My Pending Requests							
ID	Title	Academic Year	Claim Type	Total	Submitted On	Decision Status	
<b>Count= 25</b>							
▸ <b>Decision Status : Approved (4)</b>							
▸ <b>Decision Status : Not Submitted (2)</b>							
▸ <b>Decision Status : Pending Department Approval (6)</b>							
▸ <b>Decision Status : Pending PGME Approval (7)</b>							
▸ <b>Decision Status : Pending Program Approval (4)</b>							
▸ <b>Decision Status : Resubmit for Review (2)</b>							

My Completed Requests							
ID	Title	Academic Year	Claim Type	Total	Submitted On	Decision Status	Completed On
<b>Count= 1</b>							
▸ <b>Decision Status : Cancelled (1)</b>							

My Requests For Resubmission							
✓ ID	Approval Task	Status	Related Content	Created	Modified		
150	Request Resubmission Task	Not Started	<a href="#">Reimbursement Request</a>	February 7	February 7		
148	Request Resubmission Task	Not Started	<a href="#">Reimbursement Request</a>	February 7	February 7		
147	Request Resubmission Task	Not Started	<a href="#">Reimbursement Request</a>	February 7	February 7		

Figure 10

My Pending Requests							
ID	Title	Academic Year	Claim Type	Total	Submitted On	Decision Status	
<b>Count= 25</b>							
▸ <b>Decision Status : Approved (4)</b>							
▸ <b>Decision Status : Not Submitted (2)</b>							
<b>Count= 2</b>							
109	<a href="#">Reimbursement Request</a>	2019-2020	Academic Half Day	\$0.00		Not Submitted	
95	<a href="#">Reimbursement Request</a>	2019-2020		\$0.00		Not Submitted	
▸ <b>Decision Status : Pending Department Approval (6)</b>							

Figure 11



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.

