

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.sp2019.med.ubc.ca/reimbursements/SitePages/Home.aspx>
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

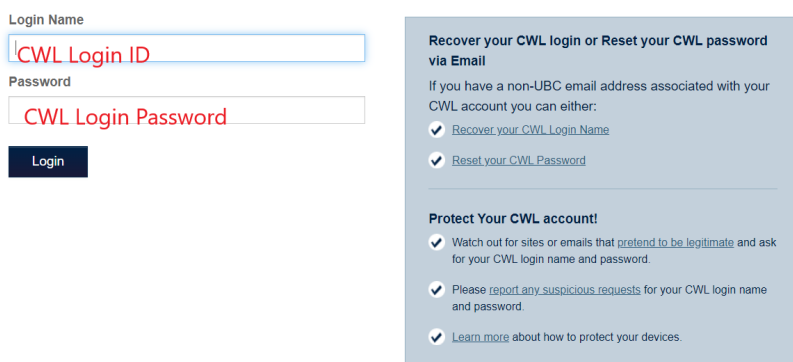


Figure 2

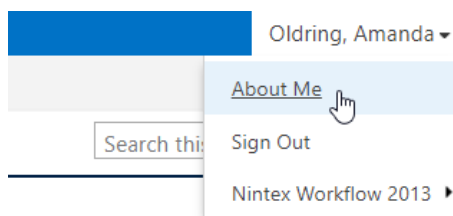
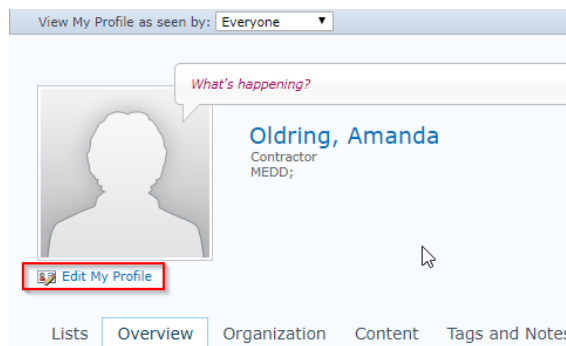


Figure 3





- 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: *	<input type="text" value="aolding@softlanding.ca"/>	Everyone
Mobile phone:	<input type="text"/>	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

Figure 5

- 1. Browse to the Reimbursement Site:
<https://apps.sp2019.med.ubc.ca/reimbursements/SitePages/Home.aspx>
- 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.

The screenshot shows the MedNet website for the Faculty of Medicine. The main navigation bar includes 'MY REQUESTS', 'MY APPROVALS', and 'SUPPORTING MATERIAL'. A sidebar menu lists 'Resident Reimbursement Home', 'Residents' (with sub-links for 'New Request', 'My Requests', 'Support'), 'Approvers' (with sub-links for 'My Approvals', 'Contact'), and 'Resident Reimbursements'. A main content area features a 'WELCOME TO THE RESIDENT REIMBURSEMENTS SITE' message and a brief description of the site's purpose. Five red callout boxes with arrows point to specific elements: 1) 'Links for Residents' points to the 'Residents' menu item; 2) 'My Approval Dashboard listing all the pending and completed tasks assigned to you' points to the 'MY APPROVALS' button; 3) 'Link to support documents about the Reimbursement solution' points to the 'SUPPORTING MATERIAL' button; 4) 'Link to Homepage' points to the 'Resident Reimbursement Home' link in the sidebar; 5) 'Links for approvers' points to the 'Approvers' menu item.

My Approvals Dashboard

My Approvals

Taking a look at all the Approval Tasks assigned to you



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	Total
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

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.

- 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.
- 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

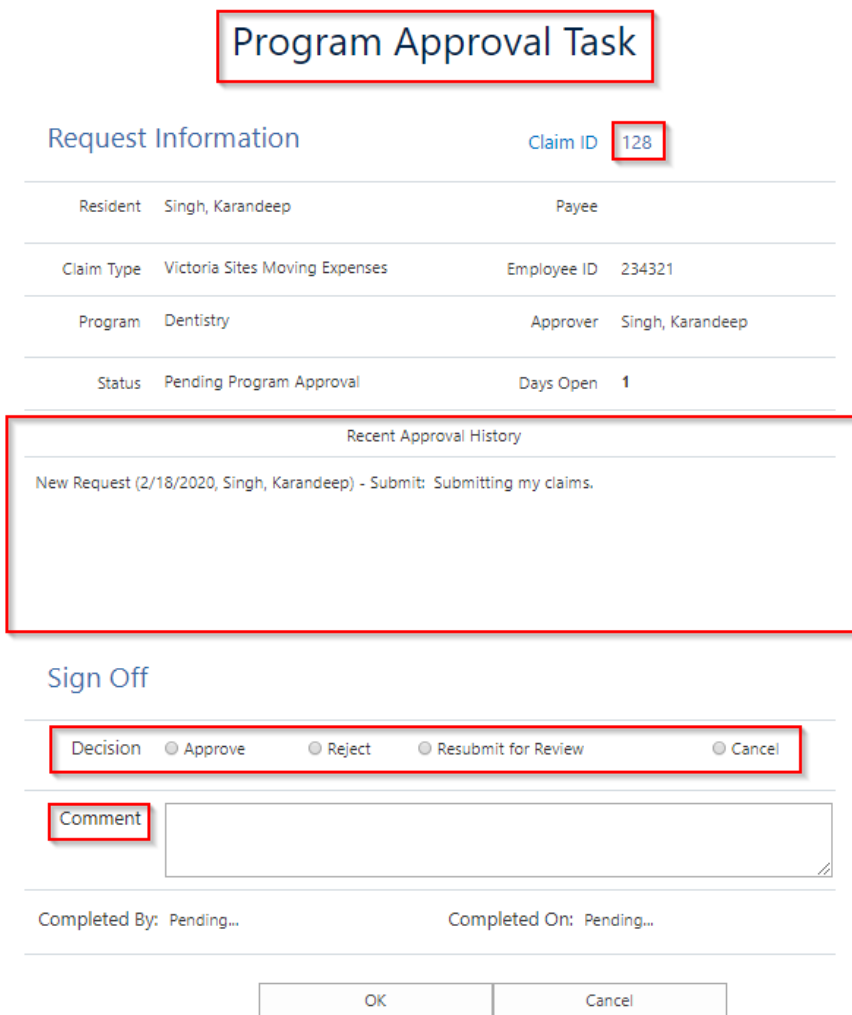


Figure 8

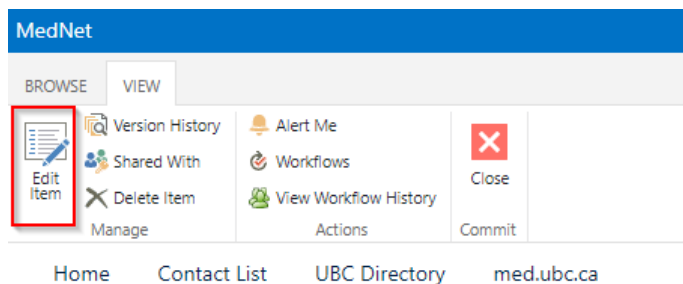


Figure 9



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.

- 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.

- The **Sign Off** section is where you will need to provide your input. You can either **approve/reject/cancel or resubmit for review.**
- 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:	Accommodation:	Course:	Rental:	AH Days:	Claimed Expenses:
\$ 95.00	\$ 300.00	\$ 0.00	\$ 0.00	1	\$ 395.00

Adjustment Totals					
Travel:	Accommodation:	Course:	Rental:	AH Days:	Approved Expenses:
				1	\$ 395.00

Figure 10

Claim Totals					
Travel:	Accommodation:	Course:	Rental:	AH Days:	Claimed Expenses:
\$ 95.00	\$ 300.00	\$ 0.00	\$ 0.00	1	\$ 395.00

Adjustment Totals					
Travel:	Accommodation:	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

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



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

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

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

Resident Reimbursements > Resident Reimbursements > New Item

Figure 14

SELECT : ADD TERMS

Figure 15



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 * Year

Block 1 2 3 4 5 6 7 8 9 10 11 12 13

Email *

Comments

Expense Details

Accommodation Amount CAD

Travel Date

Rental Amount CAD

Attachments

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

Travel:	Accomodation:	Course:	Rental:	AH Days:	Claimed Expenses:
\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	<input type="text" value="0"/>	\$ 0.00

My Request Dashboard

My Requests

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

Figure 16

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.

The screenshot shows the MedNet interface for the Faculty of Medicine. The top navigation bar includes links for Home, Contact List, UBC Directory, and med.ubc.ca. The main header identifies the user as part of the MEDNET | Team Site: Resident Reimbursements. The dashboard is divided into two main tabs: MY REQUESTS (active) and SUPPORTING MATERIAL. On the left, a sidebar menu lists Resident Reimbursement Home, Residents, New Request, My Requests (selected), and Support. The main content area is titled 'Resident Reimbursements > Residents > My Requests' and contains three sections:

- My Pending Requests:** Shows a count of 16 requests, grouped by decision status: Approved (11), Pending Program Approval (1), and Submitted (4).
- My Completed Requests:** Shows a message: 'There are no items to show in this view of the "Resident Reimbursements" list.'
- My Requests For Resubmission:** Displays a table with one entry:

✓ ID	Approval Task	Status	Related Content	Created	Modified
354	Request Resubmission Task	Not Started	Reimbursement Request	February 10	February 10