Links: Reimbursement Site | Prerequisites | Homepage | 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:

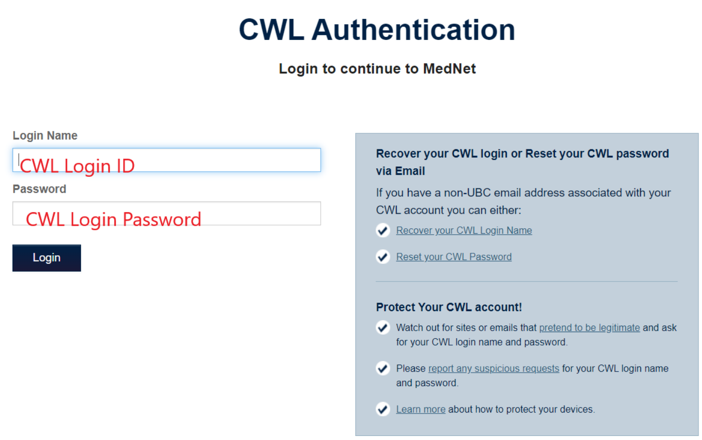


Figure 2

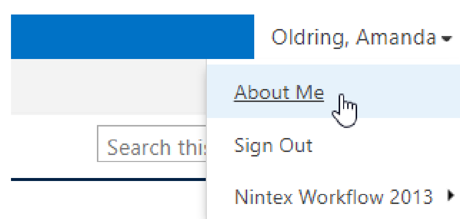
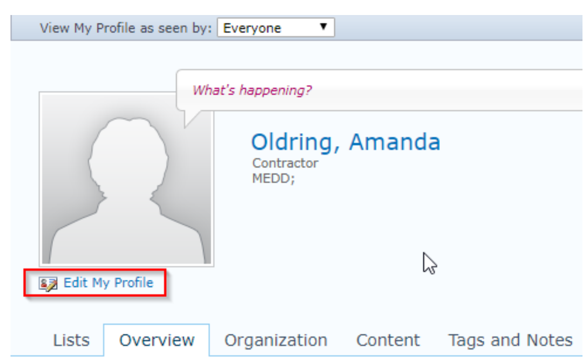


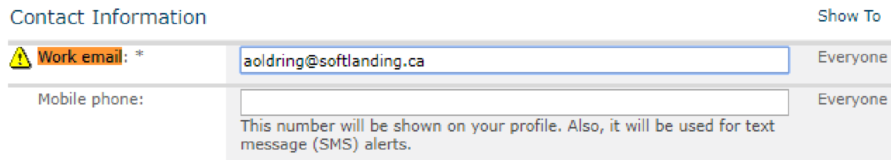
Figure 3



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

8. Click **Save and Close** on the top of the form.

Figure 4



Homepage

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

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

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

3. Click the **New Request** link (#1) to start a new claim request.

4. 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

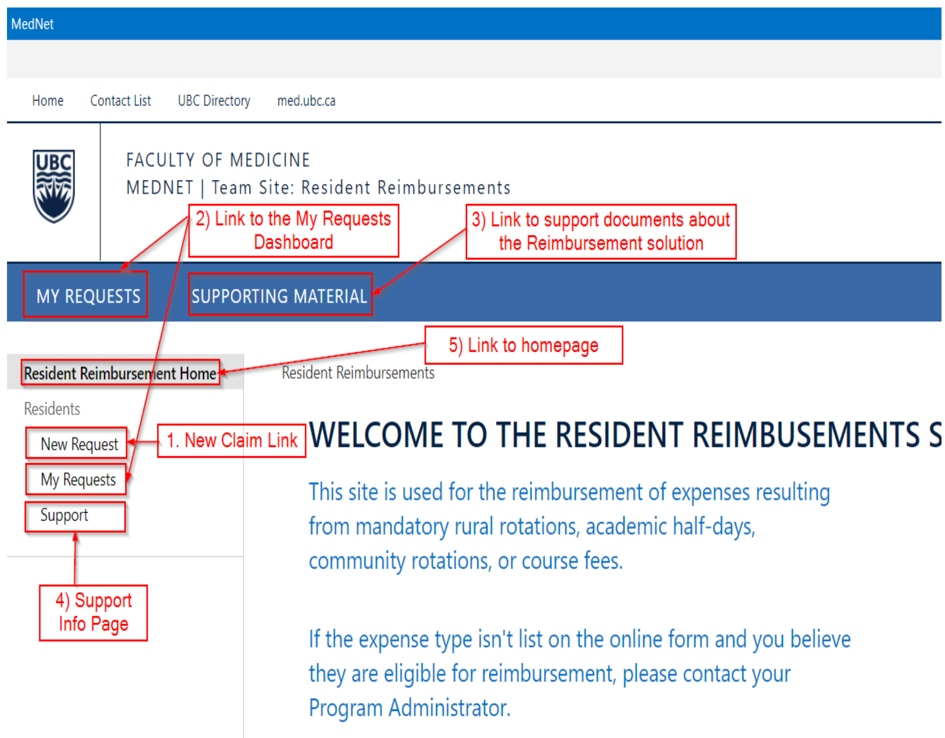
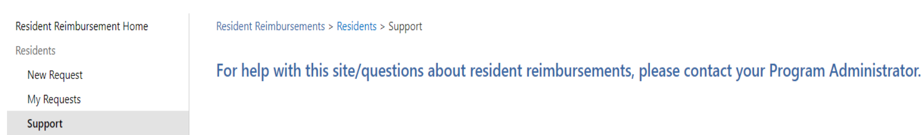


Figure 6



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).

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.

Figure 6

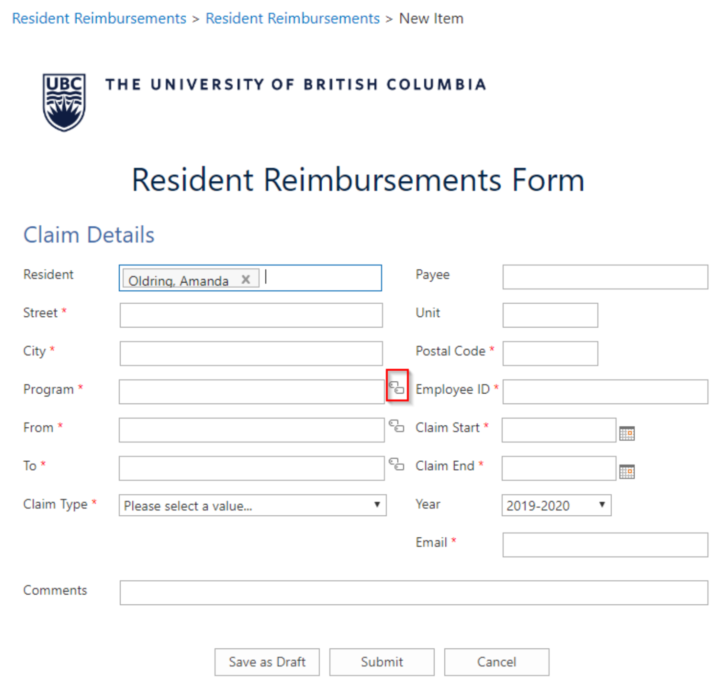


Figure 7

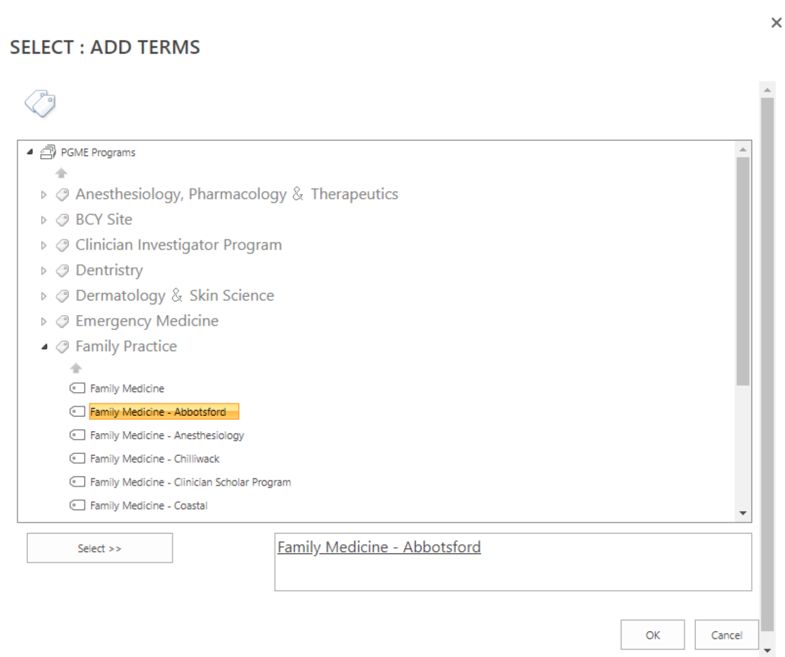
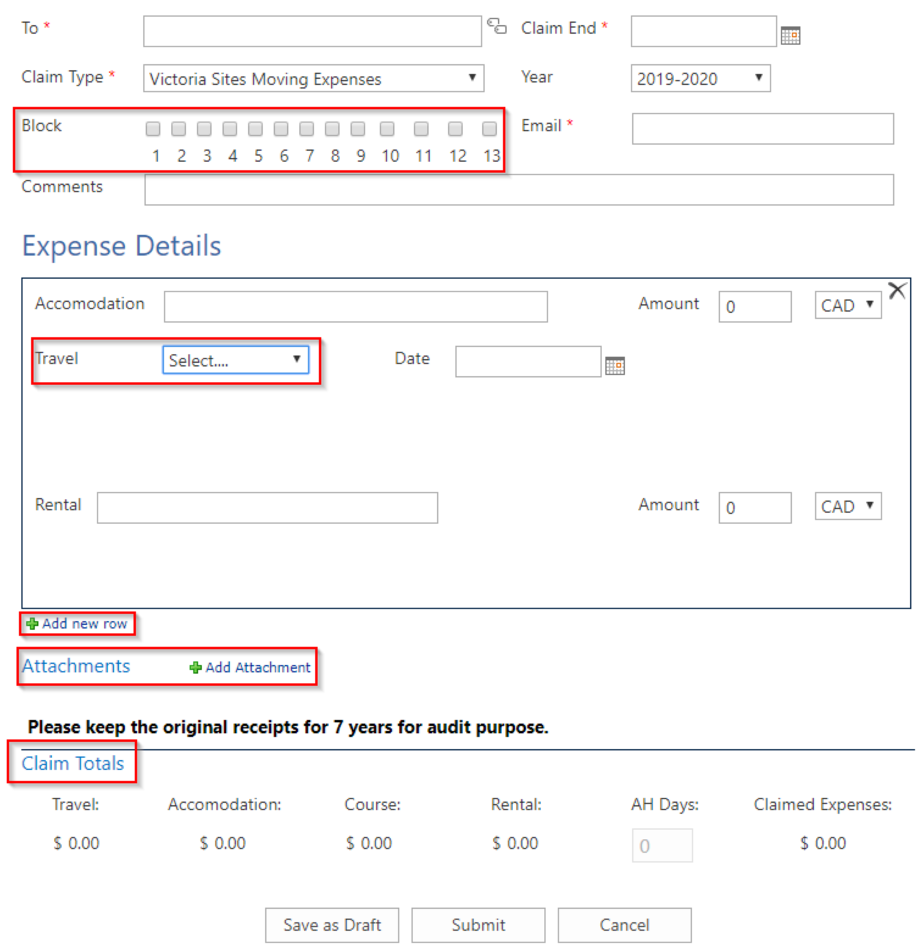


Figure 8



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 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

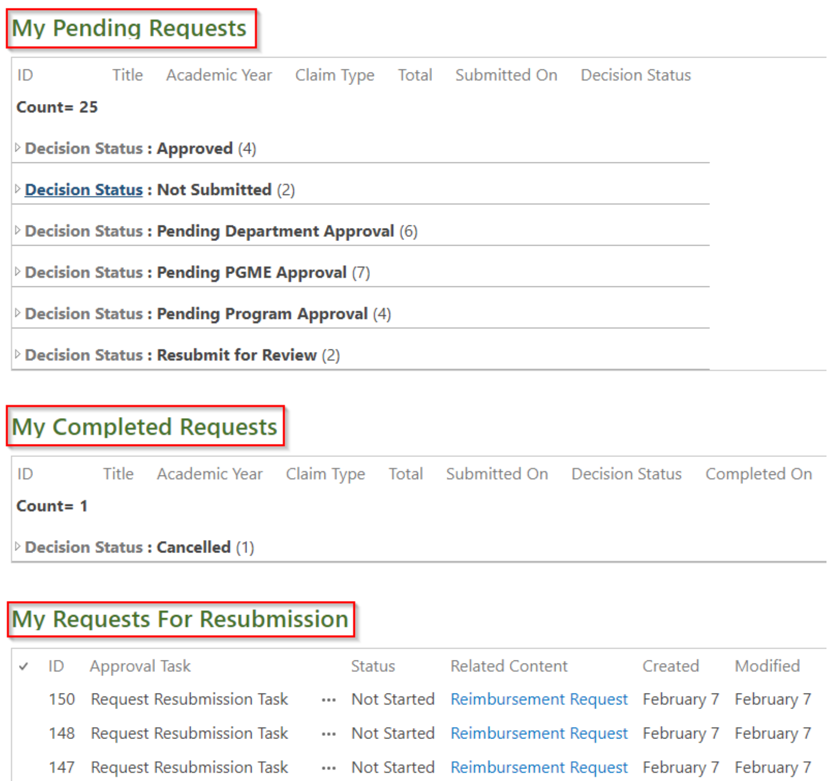


Figure 10

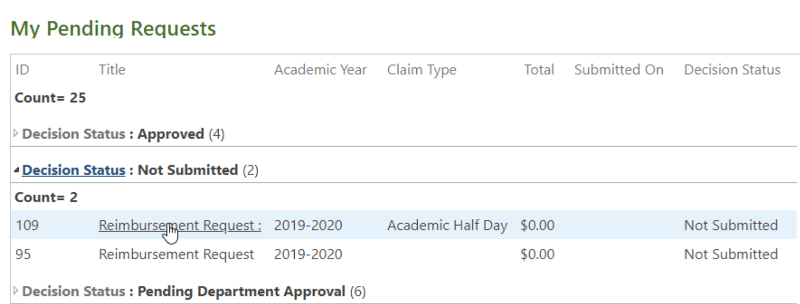


Figure 11

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.