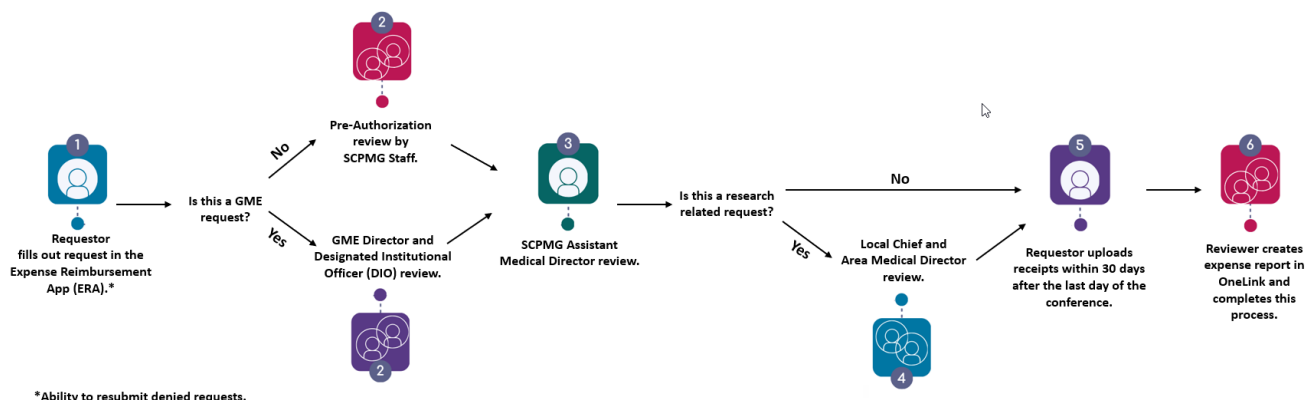


Travel Expense Reimbursement Guide for Requestors

The Travel Expense Reimbursement application is meant to streamline the SCPMG research presentation and GME travel expense reimbursement process.

The purpose of this document is to provide you with some guidance on the overall process and how to use the new software application to request travel expense reimbursement.

Overall Process Workflow



1. You can get to the travel expense reimbursement information by visiting this web page:
<https://www.kp-scalresearch.org/research-presentation-and-gme-travel-expense-reimbursement/>

DEPARTMENT OF RESEARCH & EVALUATION Southern California



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SEARCH

RESEARCH PRESENTATION AND GME TRAVEL EXPENSE REIMBURSEMENT



If you are a physician partner or associate who has been invited to give a presentation of original research (either as a talk, poster format, or medical video) that has been published or submitted for publication as a paper or abstract, you can request expense reimbursement by following the process below.

Not all expenses are reimbursable. You need to review the information below to determine what is not eligible and what limitations you have before you submit for approval or present.

2. After reading the text to ensure clarity of the process, **click on the “Travel Expense Reimbursement Request Form”** link to access the software application.

HOW TO SUBMIT FOR APPROVAL

1. Submit at least 4 weeks prior to the conference.

For all requests related to:

- SCPMG partners and associates NOT associated with GME (graduate medical education)
- GME program directors, associate program directors, assistant program directors that are partners

Fill out the [Travel Expense Reimbursement Request Form](#).

3. The above link will take you to the software application Home page.

NOTE: You must be inside the KP Network to access this application.



Please **note** the actions you can take on this page.

- Submit a Request,
- visit the FAQ & Other Resources
- revise a DENIED request or
- finish a DRAFT if any exist.

Expense Reimbursement Home Requests Approvals Metrics Admin

RESEARCH PRESENTATION AND GME TRAVEL EXPENSE REIMBURSEMENT

If you are a physician, partner, or associate who has been invited to give a presentation of an original medical video or research (either as a talk or poster format) that has been published or submitted for publication as a paper or abstract, submit a request to get pre-conference approval for reimbursement.

a. [Submit a Request](#)

b. [FAQ & Other Resources](#)

For technical issues, submit a ticket to the R&E Help Desk.

Requests Requiring Action

To continue to fill out a submission that is in draft form, or to revise and resubmit a denied request, click on the row to resume where you left off.

Id	Request Status	Draft Owner	Date Drafted
8	c. DENIED	Patty Miller	11/20/2023
1	d. DRAFT	Patty Miller	11/07/2023

4. Click on “Submit a Request” to fill out a travel expense request.

RESEARCH PRESENTATION AND GME TRAVEL EXPENSE REIMBURSEMENT

If you are a physician, partner, or associate who has been invited to give a presentation of an original medical video or research (either as a talk or poster format) that has been published or submitted for publication as a paper or abstract, submit a request to get pre-conference approval for reimbursement.

[Submit a Request](#)

5. You should see your information, name, phone etc. in the General Information section.
Fill out the Travel Expense Reimbursement Request Form by answering all the required questions.

Expense Reimbursement [Home](#) [Requests](#) [Approvals](#) [Metrics](#) [Admin](#) Logged in as: Patty Miller

General Information SAVE DRAFT

Requestor Name Patty Miller	Requestor NUID Q198465	Today's Date 11/30/2023
Requestor Phone (626) 564-3428	Requestor Department Admin Services/HR Research OPS	Requestor Location
Requestor Email Patty.A.Miller@kp.org	Status NEW	Request ID 0

Expense Reimbursement Request Form
 All fields required unless noted otherwise

Are you a SCPMG partner/associate?

Is the SCPMG partner/associate affiliated with the Graduate Medical Education (GME)?
☐ Yes ☐ No

6. When you have completed answering all the required questions, **Click the “SUBMIT” button on the lower right-hand side of the screen.**

Please note, that if you select cancel, all unsaved information will be deleted. To save your information, please select the SAVE button.

CANCEL SAVE DRAFT SUBMIT

7. **Click “Ok” button** to complete your submission and to note the request number.

Request Submitted

Your request was submitted. - Request #12

Ok



IMPORTANT NOTE: You will need to add a backup approver for the Local Chief and the Area Medical Director. If there isn't one available, then just add the same Local Chief and the same Area Medical Director in both fields.

Who is your Local Chief?
 Search for employee by NUID or First and Last Name
 Patty Miller

If the Local Chief is not available to approve, who can approve on their behalf?
 Search for employee by NUID or First and Last Name
 Patty Miller

Who is your Area Medical Director (AMD)?
 Search for employee by NUID or First and Last Name
 Ivan Lizarraga

If the Area Medical Director (AMD) is not available to approve, who can approve on their behalf?
 Search for employee by NUID or First and Last Name
 Ivan Lizarraga

I392600 - (Ivan Lizarraga - Sr IT Engineer Applications)

Helpful Tips

[Request Status](#) | [People Search](#) | [Calendar Selection](#) | [Presentation Date](#) | [Upload Docs](#)

Tip #1! Request Status Example



To see the status of your request follow the below steps.

1. Click on the link to view your request.

Testing Only in Staging environment: Notification of Submission - Your Expense Reimbursement



TRAVEL EXPENSE REIMBURSEMENT

For (SCPMG and GME) Research / Non-Research Presentation

NOTE: You must be inside the KP Network to access this application.

Patty Miller,

This is an acknowledgement email for your request.

Your request has been created with Request ID 12. This is your reference number for future updates.

[Click here to view Request](#)

For Non-GME Questions: Please contact SCPMGMDPreAuthExpense@kp.org

For GME Questions: Please contact your GME Administrative Team at GME-TA-Request@kp.org

Regards,

SCPMG Physician Expense Reimbursement Team

OR

If you are already in the application, Click the “Request” button to see the list of your requests.

PERMANENTE MEDICINE.
Southern California
Permanente Medical Group



Search Requests

Request Id

Requestor

Request

2. Once in the request, Click “Status History”

Request # 12
Request Status: REVIEW ASSIGNED

General Information **Status History** Audit History

Request Summary
General Information

Requestor Name Patty Miller	Requestor Location
Requestor NUID Q198465	Requestor Email PattyA.Miller@kp.org

3. You will see the list of statuses for your request.

Status History

Version	Status	Status Date	Action Result	Action By	Action Date	Comment
1	REVIEW ASSIGNED	11/20/2023	Reviewed	Patty Miller	11/27/2023	
1	SCPMG APPROVAL	11/27/2023	Approved	Patty Miller	11/27/2023	
1	LOCAL CHIEF APPROVAL	11/27/2023	Approved	Patty Miller	11/27/2023	
1	LOCAL AMD APPROVAL	11/27/2023	Approved	Patty Miller	11/27/2023	
1	APPROVED	11/27/2023	Approved	Patty Miller	11/27/2023	Final Approval
1	COMPLETE	11/27/2023	Completed	Patty Miller	11/27/2023	Completed

Tip #2! People Search Example



If you get a question that asks for a name, then follow the below steps.

1. Click the "Search for employee by NUID or First and Last Name" field.

Who is your Local Chief?

Search for employee by NUID or First and Last Name

2. Start typing in the NUID or First or Last Name

Who is your Local Chief?

Search for employee by NUID or First and Last Name

Patty M

- I036631 - (Patty Ma - Regl Mgr Care Coord/Case Mgmt)
- I378588 - (Patty Pascual - Specialty Unit Chg RN - Ho)
- Q198465 - (Patty Miller - Project Mgr III)

3. Select the correct name from the drop-down.

Who is your Local Chief?
Search for employee by NUID or First and Last Name

Patty M

- I036631 - (Patty Ma - Regl Mgr Care Coord/Case Mgmt)
- I378588 - (Patty Pascual - Specialty Unit Chg RN - Ho)
- Q198465 - (Patty Miller - Project Mgr III)**

4. Once the name is selected the app will automatically pull in the NUID, Name and Email information.

Who is your Local Chief?
Search for employee by NUID or First and Last Name
Q198465

Local Chief's NUID	Local Chief's Name	Local Chief's Email
Q198465	Patty Miller	Patty.A.Miller@kp.org



Tip #3! Calendar Selection Example



If a question asks for a date, such as start and end date, then follow these steps.

1. Click the calendar icon on the right of the field.

Conference Travel Date(s)

Start Date  **End Date** 

Click on the calendar icon to select date. *Click on the calendar icon to select date.*

2. Select the date on the calendar and it will be added to the field.

Jul
Aug
Sep
Oct
Nov
Dec
2024
Jan
Feb
Mar
Apr
May

December 2023 Today

SU	MO	TU	WE	TH	FR	SA
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Monday, December 11, 2023

12/11/2023

3. To go to another month, click the left-hand side for the new month.

The screenshot shows a calendar interface with a sidebar on the left containing month buttons (Oct, Nov, Dec, 2024, Feb, Mar, Apr, May, Jun). The main area displays a calendar for March 2024. A purple arrow points to the 'Mar' button in the sidebar.

Tip #4! Presentation Date Selection Example



1. Click “Add new” button. The app will automatically put in the first day of your conference, but you can change it by clicking the calendar icon (see Tip #2)

The screenshot shows the 'Presentation Dates and Times' form. The 'Add new' button is highlighted in yellow, and a purple arrow points to it. Below the button, there are fields for 'Date' (12/11/2023) and 'Start Time (Be sure to include am or pm.)'. There are also 'Add' and 'Discard changes' buttons.

2. Add the start time of your presentation including AM or PM.

The screenshot shows the 'Presentation Dates and Times' form. The 'Start Time' field is highlighted in yellow, and a purple arrow points to it. The 'Date' field is 12/11/2023. There are also 'Add' and 'Discard changes' buttons.

3. Click the “Add” button.

The screenshot shows the 'Presentation Dates and Times' form. The 'Add' button is highlighted in yellow, and a purple arrow points to it. The 'Date' field is 12/11/2023 and the 'Start Time' field is 11am. There are also 'Add' and 'Discard changes' buttons.

4. To make any changes **Click the “Edit” button to change the presentation time or “Remove” button to delete your entry and start over.**

Presentation Dates and Times

Add new

Date	Start Time (Be sure to include am or pm.)		
12/11/2023	11:00 am	Edit	Remove

i Tip #5! Upload Document Example



If a question asks you to upload a document, then follow these steps.

1. **Click the “Choose File” button.**

Please upload the invitation acceptance letter.

Choose File No file chosen Select files... Drop fil...

File Upload is Required!

2. **Select your file.**

File name: TEST - PDF

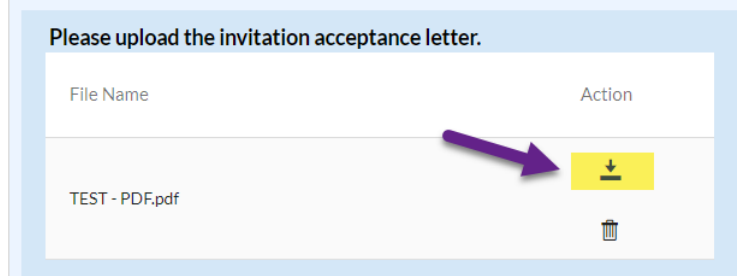
test #1	11/10/
TEST - PDF	1/20/2
Patty Test Study	11/21/

3. **Ensure that you see the file uploaded.**

Please upload the invitation acceptance letter.

File Name	Action
TEST - PDF.pdf	

4. To download the file **click the download button** (Maybe you are unsure you uploaded the correct document and want to check.).



5. **Click the trashcan button,** to delete the file and upload a different one.

