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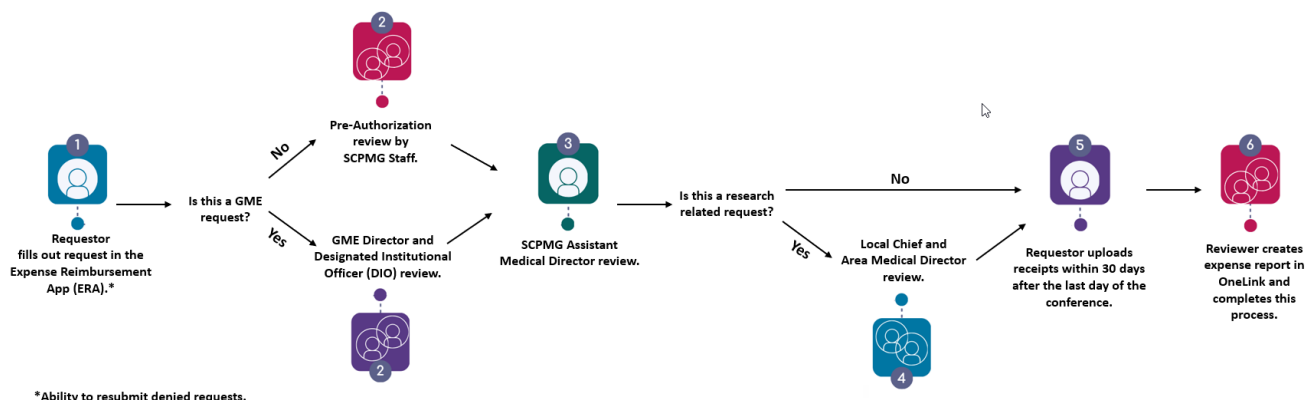Southern California
Permanente Medical Group

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

*Ability to resubmit denied requests.

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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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.

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

4. **Click on "Submit a Request"** to fill out a travel expense 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.

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

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

💡 **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.

Helpful Tips
Request Status | People Search | Calendar Selection | Presentation Date | Upload Docs

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🛈 **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.**

OR

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

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	Requestor Location
Patty Miller	
Requestor NUID	**Requestor Email**
Q198465	Patty.A.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.**

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

ⓘ 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.**

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

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

🛈 **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)

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

3. **Click the "Add" button.**

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

🛈 Tip #5! Upload Document Example

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

1. **Click the "Choose File" button.**

2. **Select your file.**

3. Ensure that you see the file uploaded.

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

Please upload the invitation acceptance letter.

File Name	Action
TEST - PDF.pdf	↓
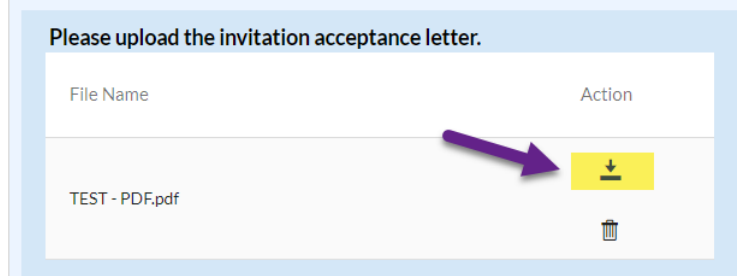
5. **Click the trashcan button,** to delete the file and upload a different one.

Please upload the invitation acceptance letter.

File Name	Action
TEST - PDF.pdf	↓
	🗑