

NYP Reimbursement Process

This process works for any approved NYP reimbursement expenses. The example here is for taxi reimbursement. Remember that you have **60 days** from the receipt date to submit.

These instructions are for the Concur iOS application. It is a similar process online at <https://concur.nyp.org>.

Note that this is a 2-part process: Hard copy submissions (see pages 6-7) + Concur app submissions

For transportation the following rules apply:

- For travel **FROM** these shifts: M, B, Peds 12P-12A shifts
- For travel **TO** these shifts: C shifts
- For off service rotations with sign-out **PRIOR** to 6:30AM or cab rides **BEFORE** 6AM

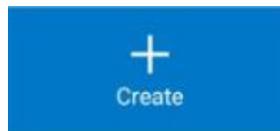
1. Download and open the **Concur App**.



2. Add your receipts to Concur by creating an Expense. **Each expense will have an associated receipt.** You can start the process by clicking either of the icons below that are on the bottom of the Concur home screen -



or



or



The Expense entry screen will look like this. **Each receipt must have a corresponding Expense entry.**

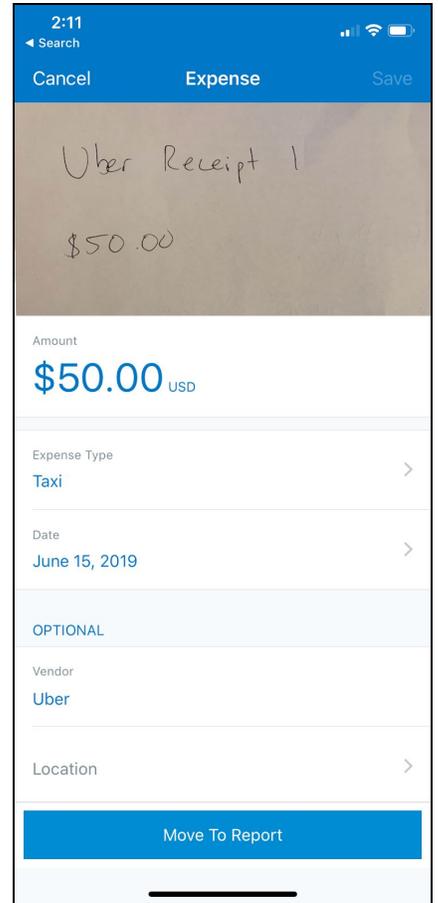
A screenshot of the Concur mobile app's 'Expense' entry screen. The screen is blue with white text. At the top, it shows the time '2:10', a search bar, and 'Cancel' and 'Save' buttons. Below the search bar is a large white plus sign icon with the text 'Add Receipt' underneath. The main form area has a white background with the following fields: 'Amount' with a value of '\$0.00 USD', 'Expense Type' with a right-pointing arrow, 'Date' with a value of 'June 15, 2019' and a right-pointing arrow, 'OPTIONAL' section with 'Vendor' and 'Location' fields (both with right-pointing arrows), and a 'Comment' field at the bottom.

Expense entry:

- Expense Type - "Taxi"
- Date - **date of cab ride**
- Vendor - **company name (Uber, Lyft, Via, NYC cab, etc.)**
- Upload receipt image and **Save**

If you have **loose receipts (i.e., receipts from yellow/green cabs or gypsy cabs), tape as many of them to an 8.5" x 11" sheet, compute the total amount on each sheet and write that amount down on the bottom of the page. You can create an Expense in Concur for each sheet and upload an image of it as your receipt.

NOTE: The iOS Concur app will ask for receipts from your photo gallery. If you have a PDF/electronic copy, you can take a screenshot of it so you have a corresponding picture in your phone's photo gallery.



3. Create an Expense for **all** the receipts you want to be reimbursed for. Don't forget to **Save** each Expense before creating a new one.
4. **Important:** Create a separate Expense for the **Graduate Staff Business Expense Reimbursement Request (approval) form** that Megan signs off on - see sample below:

New York-Presbyterian Hospital
Graduate Staff Business Expense Reimbursement Request

Date 7/1/19

Graduate Staff Name Phong Huynh

Amount Requested \$ 100.00

I hereby attest and confirm that I have reviewed the accompanying receipts and certify that these expenses were incurred to accomplish official business for the Hospital. There are no expenses claimed as reimbursable which relate to personal or unallowable expenses.

Authorized Signatory
Margaret E. Reilly
Name (please print)

| | |
|-----------------------|----------------|
| Cost Center | Account Number |
| 8 0 6 0 4 3 | |

Note: The cost center and account number should be the ones used prior to Concur

Please electronically attach this form, along with an 8.5" x 11" sheet of paper with copies of all receipts, to the Concur expense report.

Expense entry for approval form:

- Expense Type - **“Miscellaneous”**
- Amount - **\$0.00**
- Vendor - **NYP EM Residency**
- Comment - **Approval form**
- Upload signed approval form and **Save**

2:12
Search
Cancel Expense Save

Amount Requested \$ 100.00

I hereby attest and confirm that I have reviewed the accompanying receipts and certify that these expenses were incurred to accomplish official business for the Hospital. There are no expenses claimed as reimbursable which relate to personal or unallowable expenses.

Authorized Signatory
Margaret E. Reilly
Name (please print)

Cost Center 8 | 0 | 6 | 0 | 4 | 3 Account Number

Amount
\$0.00 USD

Expense Type
Miscellaneous >

Date
June 15, 2019 >

OPTIONAL

Vendor
NYP EM Residency

5. This is a sample of Expense entries for two Uber rides of \$50 each for a total of \$100. You also see the Miscellaneous expense for \$0.00

2:13
Search
Expenses

| | | |
|--|--|----------------|
| | Taxi Jun 15 Uber | \$50.00 |
| | Taxi Jun 15 Uber | \$50.00 |
| | Miscellaneous Jun 15 NYP EM Residency | \$0.00 |

6. Create an **Expense Report** by going back to the Concur home page, clicking Expense Report and the + sign on the next screen.



7. For Taxi reimbursements, the report is titled as such under Business Purpose. This is the report that you will end up submitting for reimbursement. It includes all of your expenses. Click **Create** when you're done.

2:14
Search
Cancel New Report Create

Report Name*
January Taxi Reimbursement

Report Date
Jun 15, 2019

Business Purpose*
Taxi reimbursement

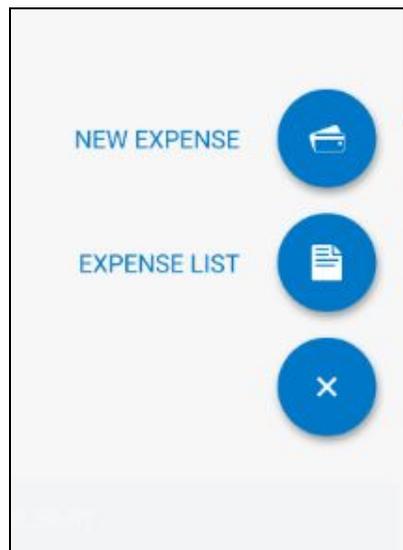
Review Duplicate transaction

Comment

Company*
NewYork-Presbyterian Hospital

Cost Center*
HS-EMERGENCY MED

8. After creating the Report, you will have to attach the Expense entries that you want added to it. To do this, click the “+” sign at the bottom of the Report screen then go to **Expense List**.



9. Check off all Expenses you'd like to add, **including the**

2:14
Search
Close Expenses

Miscellaneous \$0.00
Jun 15, 2019
NYP EM Residency

Taxi \$50.00
Jun 15, 2019
Uber

Miscellaneous expense, then click **Add to Report**.

10. Make sure the **Report Total is the same amount on the approval form that Megan signed.**

11. **Submit** the report.

Note: Before you submit you may get some flags for each expense while on the screen below. You have to set a Location To and From for each receipt (e.g. the trip was from Cornell Campus to the Columbia campus.). Click on the Expense and you can designate the locations.

Click Save anytime you make changes to your Expense entries.

2:16
← Search

January Taxi Reimburse... **\$100.00**
Jun 15, 2019 total amount
Not Submitted

Details Expenses Receipts

| | |
|------------------|---------|
| Miscellaneous | \$0.00 |
| Jun 15, 2019 | |
| NYP EM Residency | |
| Taxi | \$50.00 |
| Jun 14, 2019 | |
| Uber | |
| Taxi | \$50.00 |
| Jun 12, 2019 | |
| Uber | |

Submit

Important: You will have to hand Munira the physical copies of the completed forms below -

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1. Graduate Staff Business Reimbursement Request Form (you already saw this)

NewYork-Presbyterian Employee Business Expense Report NYP POLICY 8106
Revised: March 2017

(Original receipts required. Please tape side-by-side on 8.5 x 11 paper & attach to this report.)

Date: 1/1/19
 Name: Phong Huynh Dept: Emergency Medicine Telephone: (111) 222-3333
 Home address: 123 Main St New York NY Zip Code: 12345
 NYP Employee ID#: 123456 Company: *Cost Center:

Charge Account

I. Summary of Employee Business Expenses

| A. Reimbursement for mileage (no receipt) | | | TOTAL |
|---|---------|------------------|----------------|
| Auto Allowance | # Miles | x \$Rate \$0.535 | = Mileage |
| | | | 71770 |
| B. Reimbursement for travel expenses (attach receipts) | | | TOTAL |
| Plane / Train / Car Rental | | | 71770 |
| Taxi / Public Transportation | | \$ 100.00 | 71770 |
| Tolls, Parking | | | 71770 |
| Lodging (Attach receipt from hotel) | | | 71770 |
| C. Reimbursement for food and entertainment (attach receipts with list of attendees and business purpose) | | | TOTAL |
| Meals | | | 71150 |
| Entertainment & Celebration Events | | | 71150 |
| D. Reimbursement for other business and travel expenses (attach receipts and business purpose) | | | TOTAL |
| Other - specify: | | | 70700 |
| TOTAL EXPENSE | | | 1 00 00 |

II. Payee Attestation
 I certify that this report has been completed in conformity with the NYP Business Expense Reimbursement Policy and accurately describes the actual and necessary business expenses incurred in compliance with NYP policies unless specifically noted. I have not received reimbursement for these expenses from any other entity.

Employee Signature: [Signature] Date: 1/1/19

III. Authorization
 Approvers must be senior to the payee and in accordance with the approval matrix presented in the NYP Business Expense Reimbursement Policy.

Signature: _____
 Print Name: _____
 Title: _____
 Date: _____

* Note: Restricted / Specific Purpose Funds require additional approvals and processing. See the NYP Intranet Finance website for policy.

2. NewYork-Presbyterian Employee Business Expense Report

**New York-Presbyterian Hospital
Graduate Staff Business Expense Reimbursement Request**

Date 3/15/2020

Graduate Staff Name Phong Huynh

Amount Requested 100.00

I hereby attest and confirm that I have reviewed the accompanying receipts and certify that these expenses were incurred to accomplish official business for the Hospital. There are no expenses claimed as reimbursable which relate to personal or unallowable expenses.

Munira Persad
 Authorized Signatory
 Name (please print)

| | |
|-------------|----------------|
| Cost Center | Account Number |
| 8 0 6 0 4 3 | 7 1 7 7 0 |

Note: The cost center and account number should be the ones used prior to Concur

Please electronically attach this form, along with an 8.5" x 11" sheet of paper with copies of all receipts, to the Concur expense report.

