

WSNA Reimbursement Instructions

Monday, November 14, 2022 1:23 PM

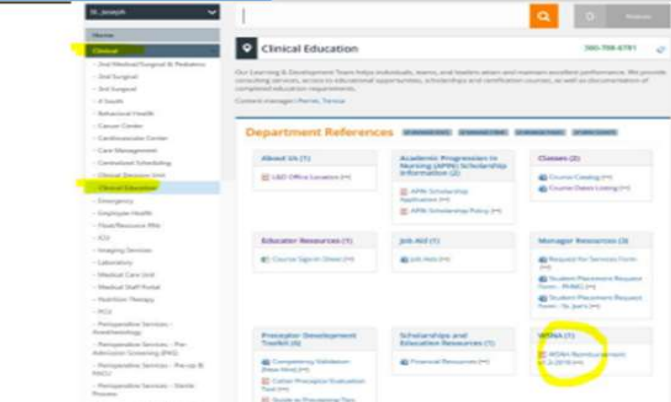
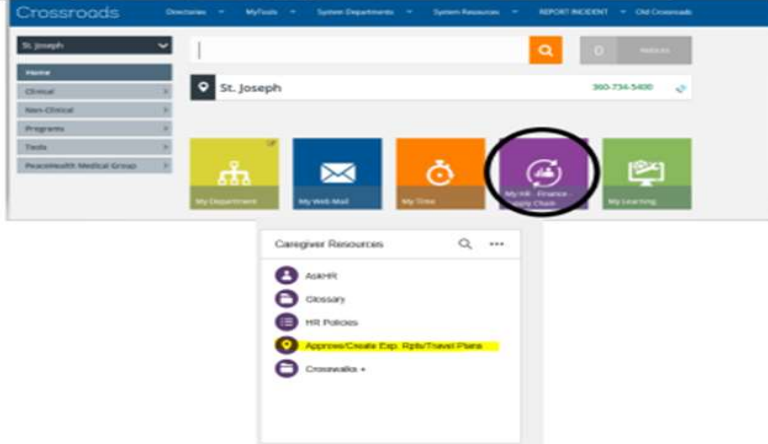
How to Submit for WSNA Reimbursement in Sync

June 21, 2020 updates:

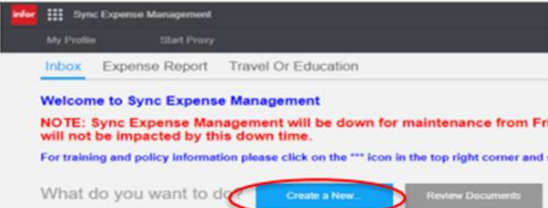
- Effective June 21, 2020 the Company-Accounting Unit will be charged to your home cost center (*this no longer goes to NWN Clinical Education*)

important information:

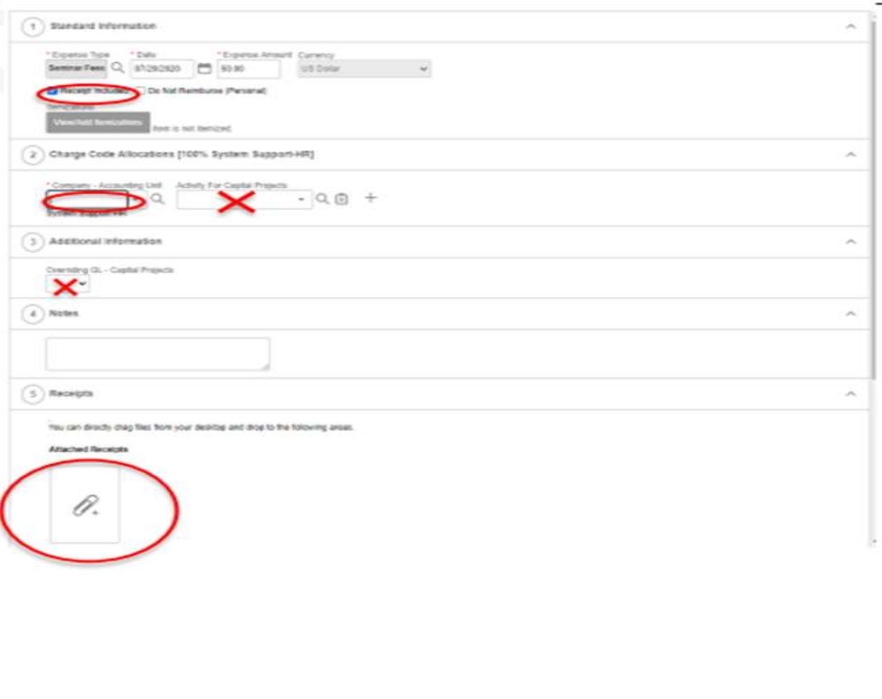
- No travel plan is needed in Sync Expense Management
- Prior to traveling the Caregiver must reach out to with their immediate supervisor to communicate their travel plans and receive approval. No special form required.
- Do not use browser back button when in Sync Expense Management
- Request for reimbursement must be submitted within 90 days of program completion
- View policy 900.1.305 Caregiver Reimbursement in PeaceHealth Policy Hub by visiting Crossroads> My Tools > Policies > All Document Search
- Questions, email apcustomerservice@peacehealth.org

<p>1) Fill out Continuing Education Reimbursement Request for Bargaining Unit RN's (WSNA) Form.</p> <p>Follow ALL instructions on.</p> <p>Form found on >> Crossroads >> Clinical >> Clinical Education >> bottom right under WSNA.</p>	
<p>2) Open Sync Expense Management</p> <p>Crossroads >> My HR (purple tile) >> Approve/Create Exp. Rpts/ Travel Plans</p>	

6/21/20

<p>3) Click on Create a New...</p>	
<p>4) Fill out Expense Claim prompts-</p> <p>Business Purpose: Type the title or name of your education (example: <i>Cardiac Conference</i>)</p> <p>Purpose: Non-Travel Expenses or Travel as appropriate (most reimbursements will be non-travel expenses)</p> <p>Type: CME</p> <p>5) Click the blue Save button in the upper right corner.</p>	<p>Document Header</p> <p>Enter the header information for this expense report and click Save.</p> <p>* Business Purpose: Cardiac Conference</p> <p>* Purpose: Non-Travel Expenses</p> <p>* Type: CME</p> <p>Submit</p>
<p>6) Click on the Out of Pocket button under the Submit button</p>	<p>Help Close More... Submit</p> <p>Add Expense Out of Pocket</p>
<p>8) Select Seminar Fees for Expense Types.</p>	<p>Expense Types</p> <ul style="list-style-type: none"> Repairs & Maintenance EQ (71720) Repairs & Maintenance Grounds (71700) Repairs & Maintenance Vehicles (71730) Returns Freight (73970) Seminar Fees
<p>9) Fill in the appropriate information regarding your education.</p> <p>Date: Enter date of event</p> <p>Expense Amount: Amount to be reimbursed based on receipts</p>	

6/21/20

<p>Receipt Included: Check this Box</p> <p>Company-Accounting Unit: This will automatically default to your home department. Do Not Edit this Field</p> <p>Activity for Capital Projects: Leave Blank</p> <p>Overriding GL-Capital Projects: Leave Blank</p> <p>Note: Enter short description of your education seeking reimbursement.</p> <p>Receipts: Attach receipt(s) which should include all of the below:</p> <ul style="list-style-type: none"> • Proof of payment • Certificate of completion, grade, hours earned, etc. • Program brochure/learning objectives • Completed Continuing Education Reimbursement Request for Bargaining Unit RNs (WSNA) (document location in Step 1 above) <p><i>*Receipts can be attached by downloading them to your desktop, then "save as" in your file. Then you</i></p>	
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location in Step 1 above)

**Receipts can be attached by downloading them to your desktop, then "save as" in your file. Then you can search for them in your files to attach.*

10) Click the blue Save button in the upper right corner.

11) If you have completed filling out your expense reimbursement click on the blue Submit button in the upper right corner.



You can check on the status of your reimbursement by logging back into your Sync page.

Your Expense Claim has now been created!

Further Questions email APCUSTOMERSERVICE@peacehealth.org or call 360-729-1111

6/21/20