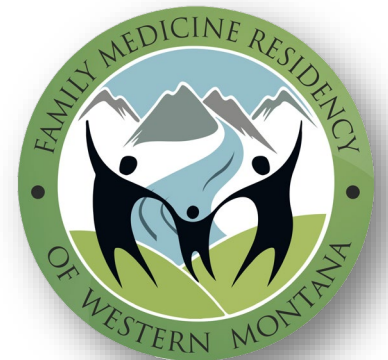


# FMRWM Reimbursement Process Improvement Pros and Cons

**Kellie Combs**

Kalispell Site Manager



# Goal of Process Improvement Project

- ❖ My goal in this project is to streamline all receipts from Residents, Staff and Faculty.
- ❖ As of now there are several people who have pro-cards and receipts, and they are always either getting lost or not being turned in on time or at all. We have had one person in charge of this but several that collect them.

# Objectives

- ❖ Improve and streamline a travel and reimbursement process for the residency program.
- ❖ Implement a new travel and reimbursement process that will decrease reimbursement delays and track the status of the reimbursement.
- ❖ Present the results of the improved process to the organization leadership so that it may be utilized in the global organization.






# Steps to Accomplish Goal

- 
- ❖ I first explored Concur and found that The University had this set up for 2 years but never deployed it.
  - ❖ After several emails and long conversations with Kristen at Concur it was determined that the University at this time was going to cancel their contract with Concur.
  - ❖ <https://www.concur.com>



## Contingency Plan



I started looking into other options, like FreshBooks, Fyle, and other online companies but they all wanted a fee for the services, and I was trying to avoid that.



Box is what our Residency program uses through the University of Montana where we keep all our policies, resident forms, contracts, receipts, etc. that we can share with the other sites.

I found that Box (which is a system we use to keep all our files, policies, data between the two sites) has an option where you can add in a scanned document or take a photo and send it to a dedicated file folder.

# Box File Sharing Information

## File Sharing Box Demo

- ❖ <https://www.box.com/resources/demo/using-box-every-day?title=File%20Sharing&videoID=6300067555001>
- ❖ <https://www.box.com/resources/demo/using-box-every-day>
- ❖ I am including two demos for file sharing and everyday use tips on how to use box.





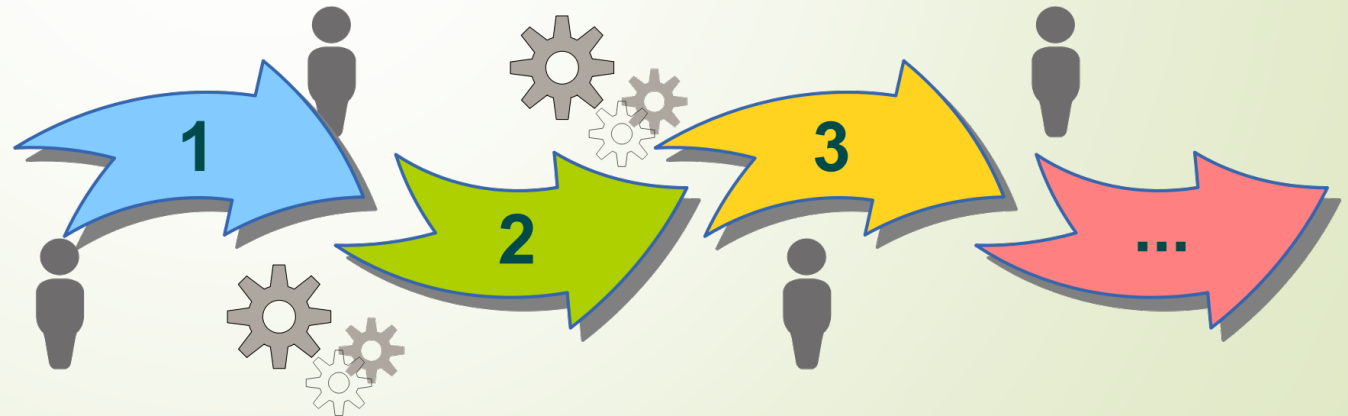
# Beta Test

- ❖ We decided to launch this at our rural site first with 6 Residents, 2 Staff and 1 Faculty (soon to be 2).
- ❖ We have noticed an easier process for collecting receipts.
  - They are either being scanned into box directly or sent vial email.
- ❖ Once box is downloaded onto your phone you can open the file folder you want to keep your receipts in. Then you scan the receipt and add it into the folder. Ours is Kalispell receipts.
- ❖ I always add a title to the receipt before scanning it in, so it is found easily.
- ❖ I have noticed less emails going back and forth for me as everything is accessible in the box folder.



# Results

- ❖ Over the past 5 months I have not had one receipt missing from my receipts.
- ❖ My faculty is starting to scan in the receipts more, but they still use an email if that is where she receives it to.
- ❖ My 2<sup>nd</sup> faculty will start 1/22/24 and we plan to have her do this right away.
- ❖ My other staff member is using the Box scanning as well and has noticed a huge change in collecting all the receipts.



# Next Steps

Reaching out to our larger site in  
Missoula

24 Residents

8 Faculty

5 Staff



My next plan is to include all the staff, faculty and residents at our larger site in Missoula, MT.

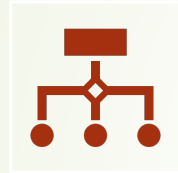
I have reached out to our financial manager and explained the process to her, and she is on board with implementing this system in box within the next 4 months.



# In Process

- ❖ We have had a few meetings to get the Missoula Faculty, Staff and Residents to start the new process. We decided to start with the new class for 2024-2025.
- ❖ We plan to train the staff first in Missoula and then the faculty, so they are prepared prior to the new class starting at the end of June.
- ❖ I have emailed our IT department to create a separate email address for everyone to use ([FRMProcards@mso.umt.edu](mailto:FRMProcards@mso.umt.edu)) only certain staff will have full access, others limited.

# Started as of February 2024



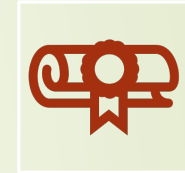
We created a receipt file for both of our sites in Kalispell and Missoula and have now sent out a link to all residents, staff and faculty at both sites.



My site director is now always using this process and the feedback from her is that it is easy and so much better than before.



I plan to meet either individually or in person with our staff first then set up a meeting with faculty to show them this process for our site in Missoula.



We will have everyone onboard for our next academic year to start this process going forward.

- ▶ Thank you for listening to my presentation today.
- ▶ Do you have any questions for me?

