



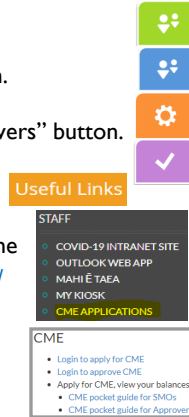
Finding the apps

Internal access is via StaffNet:

StaffNet > MyHr portal > My info > Online Claim Forms

StaffNet > SMO Portal — Other Useful Links > Online Claim Forms

- * **SMO CME**—lime green “CME Apply” button.
- * **SMO Leave**—blue “SMO Leave Apply” button.
- * **Admin**—orange leave manager
- * **Approvers**—purple “CME/SMO Leave Approvers” button.
- * Useful Links—guides and reference material



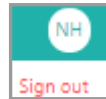
External Access

From the Waitematā external website, under the STAFF section. <http://www.waitematadhb.govt.nz/>
You can bookmark the Online Forms Page, and the App link, to your favourites so it is easy to find.

Sign-in/ out

Click on the appropriate app button and sign-in to your Waitematā DHB Microsoft account with your DHB email address and network password. This will take you directly to your dashboard.

If you are on a shared computer, always sign-out when you have finished your session.



Making a request

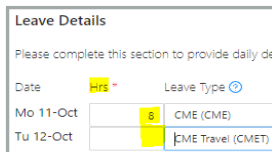
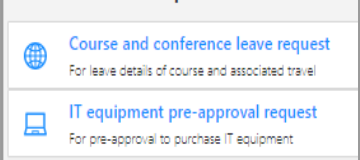
Pre-approval REQUESTS are required for IT/equipment items and conferenced leave. Access these from your dashboard.

Click on the appropriate button and fill in the screens as required and submit.

Requests are an estimate of the costs. They do not need to be exact.

Leave—You must record your daily hours for CME & CMET.

Raise a New Request



Tax

Emolument tax

Applicable to all items under the IT category. The emolument tax is a tax imposed by IRD on items that have been paid for by the company and can be used for personal as well as business use. The rate is set by IRD. It is calculated by multiplying the tax % by the full purchase price (inclusive of GST). Refer to the IRD for more information: <https://www.ird.govt.nz/employing-staff/paying-staff/fringe-benefit-tax/fringe-benefit-tax-rates>

This Claim	Emolument
\$1,000	\$639.34

Request Summary			
Excl GST Amount	GST	Emolument	CME Deduction
\$869.57	\$130.43	\$639.34	\$1,639.34

GST

GST relates to New Zealand Goods and Services Tax. It applies to most things in NZ including items purchased online from overseas. GST in your claim **must** match what is on the invoice. Otherwise, payroll will send it back to you to correct. You can edit the GST box and un-tick the GST button to ensure this is correct.

Note: The Inland Revenue Department requires all receipts over \$50 to be GST receipts – i.e. they must have a GST number on them, where the supplier is registered for GST.

Overseas expenses and some NZ companies, e.g. not-for-profit, are not registered for GST. In this case ensure that you un-tick the GST box to match the invoice.

Request Category *	Excl Gst Amount	NZ GST	GST Amount	Gross Amount
Smartphone	\$869.57	<input checked="" type="checkbox"/>	130.43	1,000

You are reimbursed the total (inclusive of GST) amount that you actually paid, it is your CME deduction amount that varies depending on the item category.

App trouble-shooting help and reference materials

Operations manager: Issues with your CME balances and changes to CME.
Email: CMEQueries@waitematadhb.govt.nz - App issues and new staff set-up.
StaffNet > Online Claims page: for guides and videos
Relevant documents on StaffNet:

- [ASMS – Senior Medical and Dental Officer MECA](#)
- [SMO Continuing Medical Education](#) – Leave and Expenses Policy
- [Work-Related Expenses Policy](#)
- [Travel Policy](#)
- [CME Q&A](#) (on SMO Portal)
- [CME App Guides](#) (on StaffNet— My HR—Online Claim Forms)
- [How to Videos](#) (on StaffNet— My HR — Online Claim Forms)
- [Online CME Apps Administrator’s Guide](#)
- [CME App FAQs](#)



Employee guide to applying for CME

Refer to StaffNet for more detailed instructions and guides.

CME overview

- ◆ CME entitlement is as per the MECA. Max: \$16,000 and 80 hours per year. Generally, this can be accrued over three years.
- ◆ Your full entitlement is given to you as of 1 January each year. (1st year pro-rata to your start date.) If you leave with 12 months, you will need to pay back spent CME over the pro-rata amount.
- ◆ CME is for items and events that fall within the boundary of education expenses for yourself only. As such, any fees for professional bodies are deemed work-related expenses and cannot be claimed here.
- ◆ All CME requests and claims must be made through the CME app.
- ◆ CME IT and equipment items and conference leave require a pre-approval request process prior to purchase / attending course. There is a clinical and a business sign-off requirement for these items.
- ◆ Like general expenses, course and conference expenses no longer need a pre-approval request. It is expected that costs will be reasonable and within policy limits where defined.
- ◆ Conference leave must be requested online through the app.
- ◆ Approved expense forms will automatically flow through to payroll for processing.
- ◆ Expenses should be claimed within 12 months of occurring.
- ◆ All claims require suitable receipts or invoices and proof of payment and currency exchange rate attached.

SMO CME online app

Dashboard

This is the home screen for the CME app, where you can check your balances, raise and manage both requests and claims. The app is intuitive and easy to get around in. Clicking on any of the buttons or arrows will move you to the next page in the section.

Clicking on the **Balance** button will take you to a breakdown of your balances in \$ or hours.

Current Balance 41,628 <small>Your entitlement balance</small>	Open Commitments 28,212 <small>Open requests and claims</small>	Available Balance 13,416 <small>Current balance minus commitments</small>
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Entitlement - Open Commitments = Available Balance

Clicking on the home icon, will take you back to the dashboard at any time.



Employee pocket guide

Making a claim

Click on the appropriate claim-type button. Fill in the screens as required and submit. IT claims can only be made on an approved REQUEST.

Give the form a name, choose the category and fill in details. Costs MUST be in NZD.

Un-tick GST button if you do not have a GST receipt. Ensure GST amount matches the receipt. You must attach receipts for each claim.

Click on the + button to attach documents. A paper clip with a number shows how many receipts are attached.

Attach proof-of-payment /currency exchange if paid in foreign currency or if you only have an invoice and not a NZD receipt. E.g. credit card statement screenshot.

Click **Next** to move through the pages and **Submit** for approval and forwarding to payroll for payment.

View history

All forms, requests and claims can be viewed from View History.

Each form (request and claim) is provided with a unique ID number, ID: 1234.

Here you can: **View** form status; **Make Claims**; see what you have claimed to date on an approved request; **close** completed

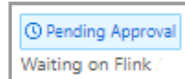
claims; **edit** forms; **cancel** forms, e.g. duplicate forms, where you have made two claims for the same thing, to get the duplicate amount credited back to your balance.

If your name is showing under **Status—Pending Approval**, it means it is **waiting on you** to do something. Check your emails for what needs to be done.

Once a **request** is approved, you can make a claim on it.

Raise a New Claim

- Course and conference claim**
Claim for the cost of course and travel
- IT equipment claim**
Claim for a pre-approved IT equipment request
- General expense claim**
Claim for minor CME related expenses



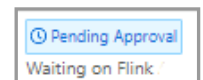
Notifications

You will receive email notification of your form's status. This could be Approval, Decline, or Query if there is a question to ask or if something is missing/incorrect in your form. Emails will come from either the system—CME automation; or, for a claim query, from payroll—Staff Service Centre.



In the case of a query—the email will tell you what the issue is that you need to correct. Read the body of the SSC email or the comments under Approver History in the CME automation email. Access forms from the email or via the app View History dashboard.

Approval History		
Approver	Status	Comments
Nicolette Hansen	Queried Oct 1 2021 1:43PM	test



You will need to **edit your form** (as below) **to make any corrections prior to clicking on Resubmit** to send it back to the person who sent the query. The form will have **your name on it** in your View History dashboard. **DO NOT start a new form.**

Amending forms

Editing, cancelling, deleting and finalising forms

Go to **View History** to view your form dashboard. Find the claim in **View History**; click on the three dots at the far right of the form and choose from the drop-down menu.

Editing a submitted form - Claims submitted and “in flight” cannot be edited for auditing purposes. You need to **Cancel** then **Open Form** to edit, make changes and **Resubmit**. It will go back to the beginning and go through all approvers again.

Editing a queried form— Use **Open Form** to edit, make the required changes and **Resubmit**. It will go back to the querier. **DO NOT start a new form—edit the existing one.**

Delete—removes the form from your history permanently. **Cancel**—form can still be edited and resubmitted by using **Open Form**. Once cancelled, you can **delete** a form.

Finalise—This will complete and close the total claim/request so that you cannot make any further claims. Any unspent dollars will be credited back to your available balance.