



Approvers Guide

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 SMOs apply for CME
- * **SMO Leave**—blue SMOs apply for other leave types
- * **Leave Admin**—orange leave manager for Admins
- * **Approvers**—purple Approve CME & SMO Leave forms
- * Useful Links—guides and reference material



Useful Links

STAFF

- COVID-19 INTRANET SITE
- OUTLOOK WEB APP
- MAHI É TAEA
- MY KIOSK
- CME APPLICATIONS**

CME

- Login to apply for CME
- Login to approve CME
- Apply for CME, view your balances, etc.
- CME pocket guide for SMOs
- CME pocket guide for Approvers

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 into your WDHB Microsoft account with your WDHB email address and network password. This will take to directly to your Dashboard.



If you are on a shared computer always Sign out when you have finished your session.

Amending forms and query function

Approvers are not able to amend forms. This has to be done by the SMO who submitted the form.

If something needs amending **Query** the form back to the SMO with a comment on exactly what needs amending.

The Query action can also be used to ask a question of another, e.g. CME Coordinator checking with Operations Manager if something is OK.



Hovering over the speech bubbles will show any comments made.

Workflow Role: CME Coordinator

Please provide screenshot of credit card statement.

View Approval Log

Quered

SMO CME Online App



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, and is on the full purchase price. As at 18/10/21 it is 63.93%

This Claim	Emolument
\$1,000	\$639.34

GST

GST applies to most things in NZ including many items purchased online from overseas. The claim **must** match what is on the invoice. Otherwise payroll will send it back to correct.

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

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.

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

Adding staff and changing staff details.

New staff, a change of approver and changes to staff entitlements (e.g. resignations, employment status, team or FTE changes) must be entered into the CME Apps. Fill in the excel sheet on Online Forms page — Useful Links and email CME Queries with the relevant info.

Useful Links

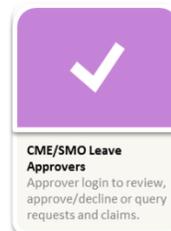
[New Starts and Staff Change Info for Access to CME App - Sheet](#)

App trouble-shooting, help and reference materials

Operations Manager: Issues with SMO CME balances, and changes to CME. Email: CMEQueries@waitematadhb.govt.nz - App Issues, 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 Administrators Guide](#)
- [CME App FAQs](#)



CME/SMO Leave Approvers
Approver login to review, approve/decline or query requests and claims.



CME Approvers guide

Refer to StaffNet for more detailed instructions and guides.

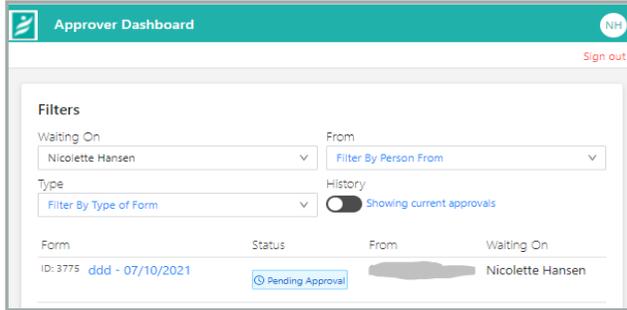
CME Overview

- ◆ CME entitlement is as per the MECA. Max: \$16,000 and 80 hrs per year. This is pro-rata to FTE and alternate employment and can be accrued over three - five years.
- ◆ Full entitlement is given as of 1st January each year. (1st year pro-rata to start date.) If SMO leaves with 12 months they must pay back spent CME over the pro-rata amount.
- ◆ CME is for items and events that fall within the boundary of education expenses for each SMO alone. As such, 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, and only a business approval. It is expected that costs will be reasonable and within policy limits where defined.
- ◆ Conference Leave must be requested online through the App.
- ◆ Approved **claim forms** will automatically flow through to payroll for processing, **Requests do not** go to payroll.
- ◆ 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 SMO online Apps. The App is intuitive and easy to get around in. Here you can see applications waiting for approval, view history, see the status, who it is from and whom it is waiting on to action. If there is nothing to approve, it will tell you.



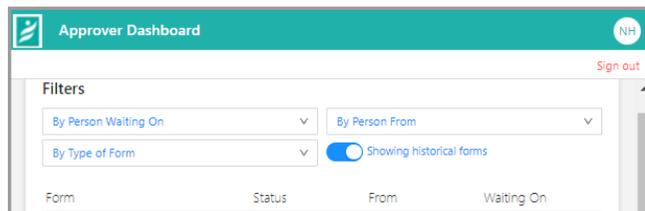
Clicking on the form name will open the form for review. Click on Next / Prev to move between pages.

Clicking on the home icon will take you back to the dashboard, or press **F5** key to refresh screen to the dashboard.

You can filter by form type, submitter and who the form is waiting on. Click the blank line on the top of the filter category to remove that filter. It defaults to forms waiting on you.

Clicking on the Toggle button will move you between the 2 pages: Current Approvals (forms you need to action) and Historic Forms (done ones).

Historic forms will stay in the list until they fall off the bottom (once approx. 1000 forms are listed) or until the SMO cancels or deletes the form.



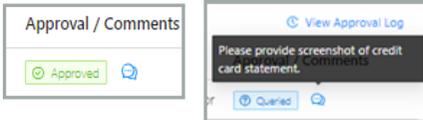
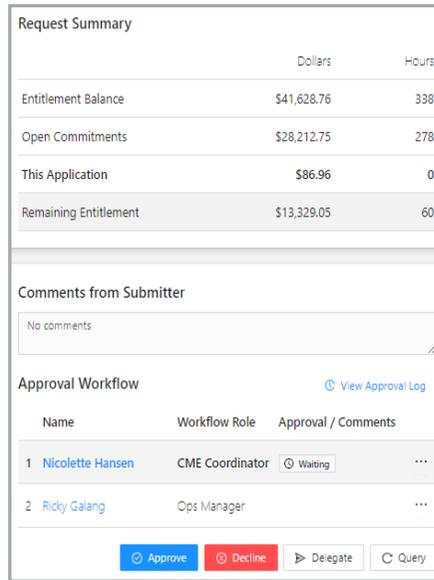
Note: It is recommended to use the Approver App for doing your approvals, rather than emails so you will not miss anything you need to action. Also it allows you to schedule your approval times rather than any time an email comes in.

Approvers Pocket Guide

Approver actions — what you need to do

Click on the form name on the dashboard to open it (or open the form by clicking on the Open Form Button on the email then review.

- Check form filled in correctly and SMO has balance for this claim/request.
- IT equipment—within policy guidelines of 1 claim /24 mths for phone/tablet/computer/laptop. On the correct form and emolument added.
- Claims are of a reasonable amount.
- GST—claimed as appropriate, box un-ticked if no GST receipt.
- Leave hours and dates recorded.
- **Attachments** present. Claims need: receipts or invoices and proof of payment; proof of currency exchange; claim in NZD.
- The paperclip in the details page shows number of attachments added. Clicking on this will open the attachment screen, click on attachment to open and view it.
- Summary—have they the balance for this claim/request?



- Approval workflow— is this correct and review any comments.

- Click on your decision and make a comment if required.

Approval workflow will show **Waiting** for the current approver. Hover over the speech bubbles to see any comments made.

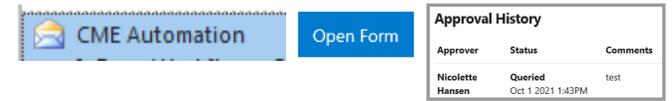
Clicking on the Approval Log will show form time-line and comments.

Someone may appear >1 time in the approver workflow if a form was queried to them by an approver or payroll.

Notifications

You will receive email notification of forms that need your approval. Emails will come from the system—CME Automation. The title of the form will tell you if it is a Query, Delegation or Approval. You can click on the **Open Form** button to open that particular form. Alternately (recommended) sign into the Approver App and action all forms on the dashboard. This way you will not miss any and can schedule your approval time.

The email will have a complete summary of the form, who, what it is for, amount and Approval History showing any comments. This could be Approval, Decline, or Query if there is a question to ask or something is missing/incorrect in your form.



Approver decisions

- **Approve** – says the application has been checked and is OK. Moves to the next step in the workflow. CME Coordinators are approving to say they have checked the form is correctly filled in and has the required attachments. Operations and General Managers have the final approval delegation.
- **Decline** – returns to the SMO. They can edit and resubmit.
- **Delegate** – to someone else to approve instead of you. E.g. CMO if a very expensive laptop.
- **Query** – to ask a question of someone or tell SMO they are missing something e.g. ticking the GST box, or hours/dates for leave wrong. They can then correct the form and resubmit back to that person.

Editing workflows

You may need to edit a workflow approver if someone has left or is on leave. You choose an option based on the role and not the person. These are set in the app. To add an approver to this list mail CME Queries with name and role.

Click on the "... " to the far right of the Approval Workflow box and **Change this approver**. Choose the person and comment why change is occurring, then OK.

