THE STEPPING STONES GROUP

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Welcome to Concur

Finance Reimbursements Reference Guide 26/27 School Year

New Hire and PDA Letter

Attached: Reimbursement Policy, New Hire and PDA Letter, and Budget and Reimbursement Tracking

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Reimbursement Policy

Reimbursements are paid out via reports submitted in **Concur**. We do **not** reimburse receipts sent to Finance Reimbursements through email.

Only receipts 07/01/26-06/05/27 are eligible. **Deadline for Submission: 06/05/27 for the 26/27 school year.** Professional Development expense reports are only eligible for reimbursement during your employment period. They cannot be used for expenses incurred before your assignment start date or after your employment has terminated.

Concur can be accessed at the following link: https://www.concursolutions.com or with the mobile app.

For assistance with Two-Factor Authentication, see Two-Factor Authentication document attached to the Welcome email or email Finance Reimbursements for a new copy.
For full departmental resources, check out our page at Home - SSG For Me.

To facilitate timely reimbursement and ensure deadlines are not missed, please submit expense reports 30 days after purchases are made (up to 90 days at the latest).

For smoother processing, ensure all reports contain Receipt Images which meet the following criteria*:

Vendor
Date of purchase
Itemization/Cost of each item
Total paid
Method of payment

If any of these items are missing from documentation, your report will be sent back needing changes.

PRE-AUTH expense type is not the same as PDA and is not to be used for submissions for any reimbursements.

Reimbursement of New Hire Expenses and Professional Development Expenses (PDA)

Furniture (e.g. desks, chairs, etc.) and Clothing are not reimbursable.

Due to the nature of item eligibility having the potential to change year-to-year, items which were eligible for this school year may not be eligible next year and going forward.

Direct any policy, eligibility or deadline questions to the Finance Reimbursements Team: finance.reimbursements@ssg-healthcare.com

***Finance reimbursement reserves the right to decline eligibility of an expense at any time to maintain the integrity of our policy.**

Eligible New Hire Expenses

- Background Check
- CPR/BLS/ALS
- Fingerprints/Live Scan
- TB skin test
- Transcripts
- Notary fees
- Mandatory Reporter Training
- Mail/Fax costs for sending fingerprints

Eligible PDA Expenses * Eligibility list is not exhaustive

Please email Finance Reimbursements at finance.reimbursements@ssg-healthcare.com with any eligibility questions.

ASHA or AOTA dues/membership fees

Licensure Programs (These are NOT reimbursable as New Hire expenses)

- State Licenses
- Certifications
- Exams
- Specialized Trainings

Professional Subscriptions

- e.g. SpeechPathology.com, Teachers Pay Teachers
- ChatGPT

Professional Organization Dues

- For all Disciplines we employ

Teaching Resources/Materials

- Printables
- Learning Platforms

Therapy Materials

- Manipulatives (OT classroom related)

- Toys, small musical instruments
- Books
- Sports equipment
- Apps
- Resistance bands and foam rollers
- Sensory tools
- Art supplies
- Items for gross motor skills (e.g. puzzles, building blocks)

Office Supplies
- Laminating sheets
- Printer ink, printer paper, toner
- Organizational supplies (e.g. file folders)
- Planners and notebooks
- Writing materials
- Pencil sharpeners
- Staplers

Office Hardware
- Laptop or tablet (e.g. iPad)
- Monitor, keyboard, mouse
- Printer, Small laminating machine (Cricut NOT eligible)
- Hue/Web Cam
- Cell phone
- Microphone
- Monitor stand

Conference/CEU Event Travel (Travel and expenses MUST first be approved by your management team)
- Flight
- Lodging
- Meals
- Tolls and Parking NOT eligible

Continuing Education
- College Courses or Tuition
- Online Professional Development courses

Accessories
- Headphones (including AirPods)
- Rolling bag/Work briefcase (NO purses)

For Nurses ONLY
- Scrubs (NO other clothing is eligible)
- BP cuff, Pulse oximeter

Mailing fees for sending protocols to the School District are the ONLY expenses reimbursable as Pre-Authorized

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Budget and Reimbursement Payment Tracking Procedure

To keep up with your budget balances

From Concur's home screen, choose the Reporting icon from the menu in the top left and click Budget Dashboards. You will then see a screen with a window for both your PDA and Wellness budgets. Clicking on the 3 dots in the top right corner of either budget window will give you the option to view that budget's details.

Payment Tracking

It generally takes 7-10 days to receive payment once a report is approved. But Concur will notify you that your reimbursement has been PAID once your Report goes into Processing status.

Your reimbursement will appear in your bank account separate from your normal paycheck.

To track the payment status of your Reports in Concur:

From the Home screen, click the Home dropdown and choose Expense.

There, you will be able to manage your expenses. Make sure you choose This Year from the View dropdown to see approved reports ready for payment.

Click on the Report you want to view.

From there, click the Report Details dropdown and choose Audit Trail if you want to see when your Report was in various statuses, or Report Payments to see your payment status and *estimated* payment date.

If you do not see the payment 10 days after the estimated deposit date, please contact your bank, as we have sent the funds. Concur does not have authority over bank recovery procedures. Once funds have been transmitted, the resolution is fully in the hands of the financial institutions involved.

NOTE: If your banking information in your Concur profile is incorrect, your payment status will show the bank Returned your deposit. You will need to update your banking information in Concur and when we make the next payment, Concur will retry to deposit funds. **Do not resubmit your report**.