

## STAYWELL PLUS INCENTIVE REIMBURSEMENT PROCEDURES

**Only employees** will be submitting their Staywell PLUS Incentive Reimbursement forms through OnBase.

Spouses will still need to fill out a hard copy of the form and turn it into the Health Analyst. The form for spouses is available in OnBase > Retrieval > Forms – Everyone > Staywell PLUS Incentive Reimbursement Form – Spouse Master.

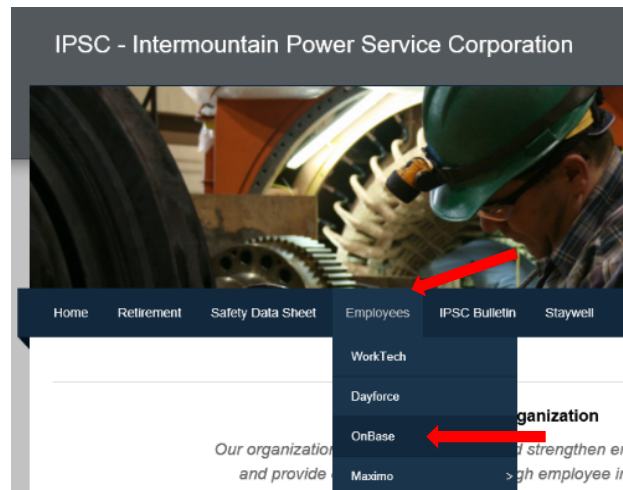
### I. ENTERING A STAYWELL PLUS INCENTIVE REIMBURSEMENT FORM

A. Login to **OnBase** using icon located on your desktop.

1. Click on the **IPSC webpage icon**.

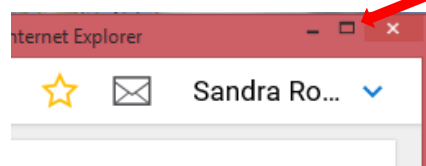


2. Select Employees and then OnBase.



3. The **OnBase webpage** will open. Enter your **login name** and **password** (this will be the same login name and password you use to login to your computer) and click on **Login** or hit **Enter**.

4. The **OnBase Document Retrieval** screen will appear. (You may need to **maximize** the screen.)



- B. In the upper left-hand corner, click on the **three horizontal blue lines** "**hamburger**." A drop-down menu will appear.



1. Scroll down to **New Form** and click on it.

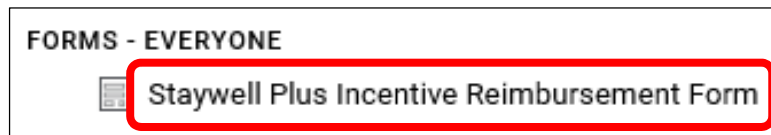
**DOCUMENT**

Document Retrieval

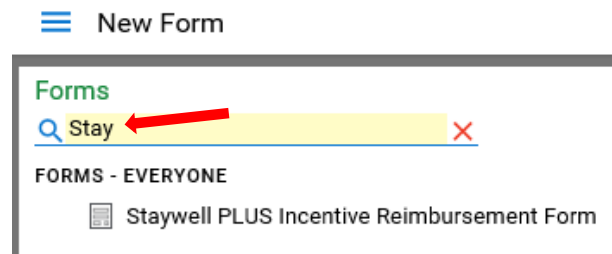
Custom Queries

**New Form**

- C. The **Forms** menu will appear on the screen. Scroll down to **FORMS - EVERYONE** and click on the **Staywell PLUS Incentive Reimbursement Form** to select it.



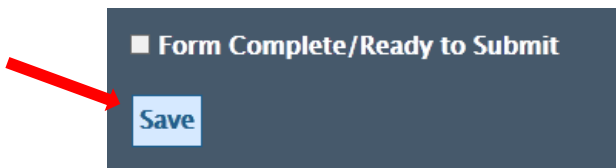
Or use the **quick access method** and begin typing **Stay** next to the magnifying glass (see red arrow below). A list of forms that have the typed information will come up. Click on the **Staywell Plus Incentive Reimbursement** form to select it.



- D. The form will appear on the right-hand side of your screen. A blank Staywell PLUS Incentive Reimbursement Form will appear. Fill out the form. Items marked with a red asterisk\* are required.

**Note: If item desired to be purchased is not listed as an approved item in the guidelines and needs to be preapproved, only those items marked with a red asterisk\* need to be filled out. The rest of the information, including employee signature can be filled out when submitting form for reimbursement.**

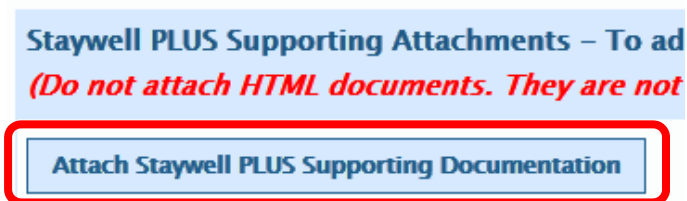
1. To **Save** the document and send it to a **Holding queue** where it can be worked on later before entering the workflow, click on the **Save** button at the bottom of the form. **DO NOT** click on the **Form Complete/Ready to Submit** checkbox until you are ready to have the form enter the workflow. If you choose to Save the form to update at a later time, an email will be sent to you explaining how to access the form in the Holding queue.



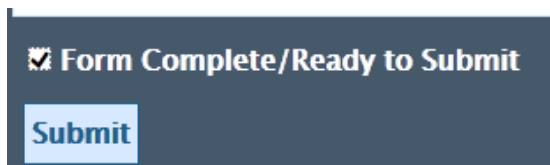
2. If items are grayed out, then they are filled out automatically, they can only be filled out by designated personnel, or the form is locked by a previous user.
  - a. To unlock the form, contact a member of the OnBase Team and ask them to check to see if the form is locked by another user. If so, they can unlock it.
3. To view the **Staywell PLUS Incentive Reimbursement guidelines**, click on the green hyperlink on the form.

[Click to open current guidelines.](#)

4. To add receipts, brochures, or other documentation click on the **Attach Staywell PLUS Supporting Documentation** button.



5. After the Staywell PLUS Incentive Reimbursement form has been filled out and is ready to enter the workflow, do the following:
  - a. Click on the **Form Completed/Ready to Submit** checkbox.



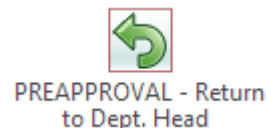
- b. Click on the **Submit** button to send the Staywell PLUS Incentive Reimbursement form through the workflow for approval.
- c. If the Staywell PLUS Incentive Reimbursement form was sent to the **Holding queue**, do the following when ready to submit:
  - (1) Click on the **Form Complete/Ready to Submit** checkbox.
  - (2) Click on the **Save** button.



- (3) Click on the **Submit** button (green circle) located in the bottom left-hand corner of the InBox screen to send the Staywell PLUS Incentive Reimbursement form through the workflow for approval.



- E. If the **Staywell PLUS Incentive Reimbursement** form is sent back to you by the **Department Head** requesting additional information, you will receive an email explaining what additional information needs to be added and how to access the form in workflow.
  - 1. Add the additional information and then click on the **Save** button to save the changes.
  - 2. Click on the **PREAPPROVAL - Return to Dept. Head** button to send the Staywell PLUS Incentive Reimbursement form back to the Department Head.



- 3. A popup box will appear asking you to enter the additional information that was added so the Department Head will be reminded of the reason the form was sent back to you.

- F. If the **Staywell PLUS Incentive Reimbursement** form is sent back to you by the **Health Analyst** requesting additional information, you will receive an email explaining what additional information needs to be added and how to access the form in workflow.
1. Add the additional information and then click on the **Save** button to save the changes.
  2. Click on the **REIMBURSEMENT – Send to Health Analyst** button to send the Staywell PLUS Incentive Reimbursement form back to the Health Analyst.



REIMBURSEMENT - Send  
to Health Analyst

3. A popup box will appear asking you to enter the additional information that was added so the Health Analyst will be reminded of the reason the form was sent back to you.

## II. APPROVED STAYWELL PLUS INCENTIVE REIMBURSEMENT FORMS

- A. After the Staywell PLUS Incentive Reimbursement form has been approved by the Health Analyst and Department Head, it will be sent to the Accounting Clerk for processing.
1. An email letting you know that payment has been processed will be sent to you after the Accounting Clerk has processed your Staywell PLUS Incentive Reimbursement form for payment.

## III. ACCESSING THE STAYWELL PLUS INCENTIVE REIMBURSEMENT FORM IN WORKFLOW

- A. In the upper left-hand corner, click on the **three horizontal blue lines** "**hamburger.**" A drop-down menu will appear.



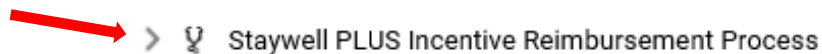
1. Scroll down to **WORKFLOW, Open Workflow** and click on it to open the Workflow Screen.

**WORKFLOW**

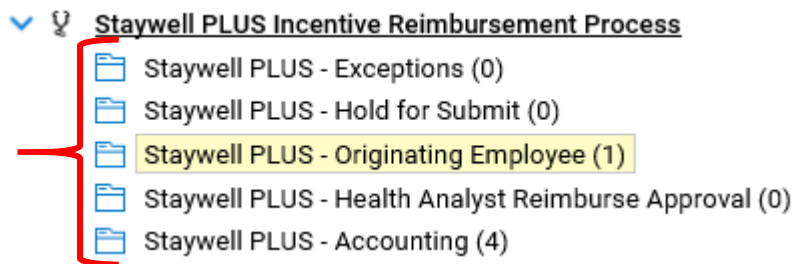
Open Workflow



2. Scroll down to find the **Staywell PLUS Incentive Reimbursement Process** workflow and click on the arrow to the left of the name.



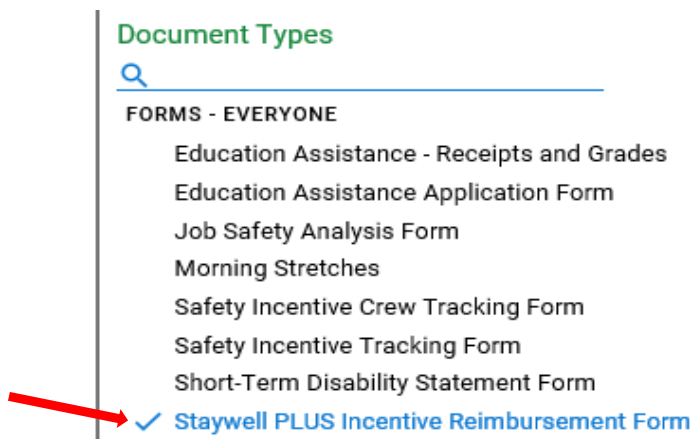
3. The Staywell PLUS Incentive Reimbursement Process workflow will open up showing the different queues you have access to in the workflow.



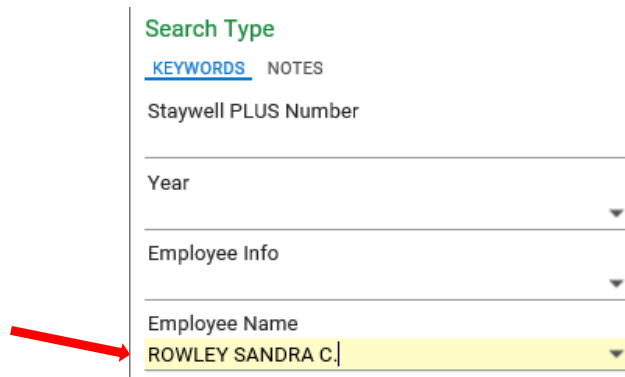
- a. Left click on the **Staywell PLUS – Originating Employee** queue to find your form.
- b. If there is more than one form, click on the form you are interested in to open it up in the bottom screen.

#### IV. VIEWING STAYWELL PLUS INCENTIVE REIMBURSEMENT FORM IN ONBASE

- A. Under Document Types in Document Retrieval, scroll down to **FORMS - EVERYONE** and click on the **Staywell PLUS Incentive Reimbursement Form**. Or use the **quick access method** and type **Stay** next to the magnifying glass.



1. Enter your **last name** in the **Employee Name** field. A drop down menu will appear showing names that match what was typed. Select your name.



Search Type

[KEYWORDS](#) NOTES

Staywell PLUS Number

Year

Employee Info

Employee Name

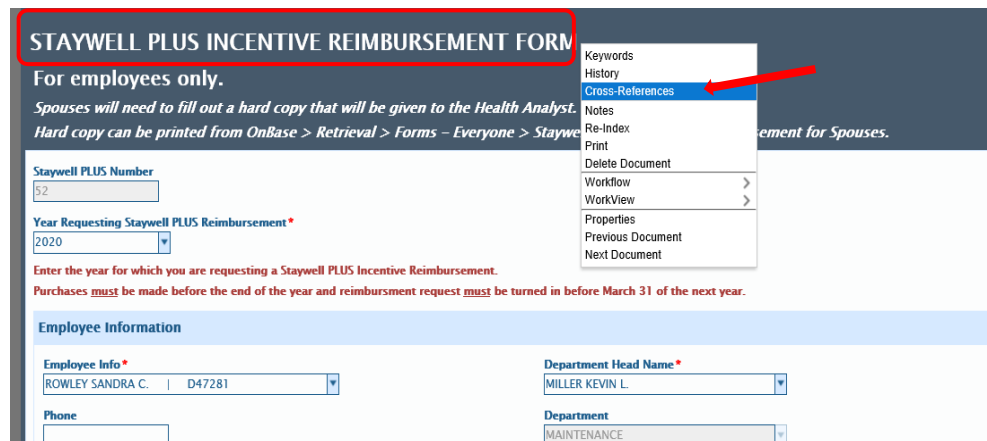
ROWLEY SANDRA C.

2. Click on **Search** at the bottom of the screen to bring up your Staywell PLUS Incentive Reimbursement Forms.
3. Double click on the **Staywell PLUS Incentive Reimbursement** form to open the form.

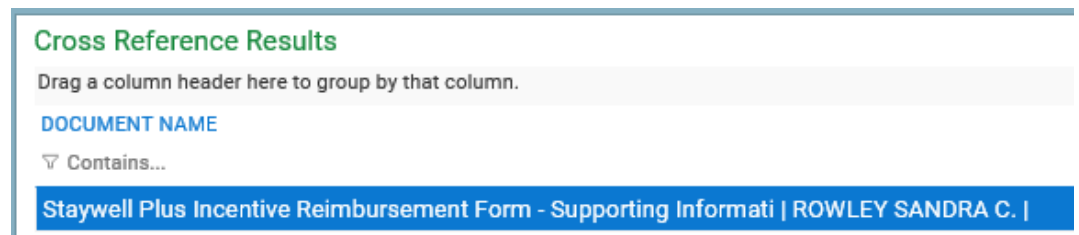
Staywell PLUS Incentive Reimbursement Form   ROWLEY SANDRA C.   MAINTENANCE   IN PROCESS
Staywell Plus Incentive Reimbursement Form   ROWLEY SANDRA C.   OPERATIONS   DENIED
Staywell Plus Incentive Reimbursement Form   ROWLEY SANDRA C.   CONVERTER STATION   APPROVED

- a. The status of the form is shown on the far right-hand side.
  - **Preapproved** means that the Department Head has approved the Staywell PLUS Incentive Reimbursement request for an item that is not listed in the Staywell PLUS Program Guidelines.
  - **In Process** means that the Staywell PLUS Incentive Reimbursement form is waiting for approval from the Health Analyst and/or Department Head.
  - **Approved** means that the Department Head has approved the Staywell PLUS Incentive Reimbursement.
  - **Completed** means that the Accounting Clerk has processed the Staywell PLUS Incentive Reimbursement for payment.

- **Denied** means that the Department Head did not approve the preapproval request for reimbursement of an item not listed in the Staywell PLUS Program Guidelines.
4. To view documents that were attached to the Staywell PLUS Incentive Reimbursement form when it was submitted or when it was processed, open the document.
- a. Right click on the title bar **Staywell PLUS Incentive Reimbursement Form** and select **Cross-References**.



- b. A new screen will appear listing the documents that have been cross-referenced with the Staywell PLUS Incentive Reimbursement form.



- If there is only one document that has been crossed referenced, it will automatically open when **Cross-References** is selected.
- c. Double clicking a cross-referenced document will enable it to be viewed in the bottom screen or in a new screen depending on the type of document that was attached (pdf, Word, image, etc.).