

End User Guide

Updated 11/1/2023

As a Non-Employee at HHMI, learn how to submit an HHMI Business-related Expense for Reimbursement.

SET UP YOUR ABACUS ACCOUNT

1. Receive email from **hi@Abacus.com** and click **Accept Invite** to set up your account.
2. **Create Password** > Check box for Terms and Privacy Policy and click **Get Started**
3. Select your preferred Two-Factor method for receiving a verification code (SMS or Email) and click **SEND CODE**. Next, enter the Verification Code and click **Enable 2FA**. Copy your backup code just in case you cannot receive access codes. Then, click **CONTINUE TO ABACUS**.
4. **Set Up Your Personal Account** by entering your account info and click **Finish Setting Up**
5. In Abacus, on the left menu, click **Get Started** to view other actions to complete your account set up.
 - a. **Add your bank account** – This is important to receive payment. Your account must be US-based.
 - b. **Download the app** (Optional) – On your smartphone, open a second email from Abacus and tap the link to download the mobile app. This app is a helpful tool to take photos of receipts and submit expenses from your smartphone.


Next, tap **Yes** to Allow Notification and you are ready to submit expenses. Also, if prompted, enable camera feature with Abacus mobile app.

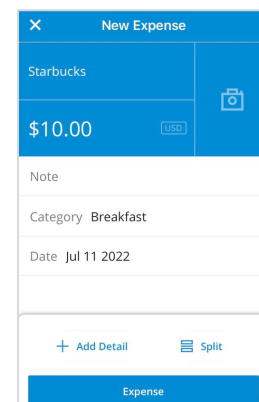
SUBMIT EXPENSE FOR REIMBURSEMENT


Option 1: From your desktop computer, open the Abacus app

1. Click **+ NEW REIMBURSABLE EXPENSE** icon at top right
2. Enter **Amount**, **Merchant**, and **Category**. Update **Date**, if needed.
 - If Amount is over \$75, add receipt image. Upload receipt image from your computer, OR from **Receipts** in Abacus. (If you have a receipt in your email, forward it to receipts@abacus.com and it will be converted to a PDF file and saved in your Abacus account under Receipts.)
 - If **Category** = **Miscellaneous**, enter additional information in the **Note** field. This is required.
 - Do not update **Activity Tracking ID**, **Cost Center ID** and **Project ID** fields.
 - To Expense Personal Mileage, click **Merchant/Mileage** > **Mileage** > **Category** = **Personal Car Mileage** > **Enter From/To** > **If Roundtrip** > **Send**.
3. In the comments, enter the meeting name and any necessary information.
4. Click **Send** to submit. Repeat steps for additional expenses.

Option 2: From your smartphone, open the Abacus app 

1. Tap the blue pencil icon  to enter a new expense.
(For Android, click + icon at lower right first, then click blue pencil icon.)
2. Enter **Merchant**, **Amount**, and **Category**. Update **Date**, if needed.



- If Amount is over \$75, add receipt image. Tap camera icon  to take a photo of receipt, choose from library, or from your saved receipts.
- If **Category** = **Miscellaneous**, enter additional information in the **Note** field. This is required.
- To Expense Personal Mileage, tap **Merchant/Mileage** > **Mileage** > Enter **From/To** > Indicate if **Round trip** > **Done**.

3. Tap **Expense** to submit. Repeat steps for additional expenses.

Note: Submitted expenses are not visible on the Abacus mobile app until the user has at least one approved expense.

APPROVAL AND PAYMENT

- You will receive an email notification when an expense is Submitted, Approved and Awaiting Payment, Denied and Completed (Paid).
- Your expenses must be fully approved by Wednesday, 5:00 PM ET to be paid Thursday or Friday that same week. Otherwise, if it's approved after this time, you will be paid the following week.

REVIEW EXPENSES


1. On the left menu, click **Reimbursable Expenses** to view your expenses in each status.
2. Click on an expense to view details, including its **PROGRESS** in the process.

CREATE AND MANAGE TRIPS – OPTIONAL


As an option, users can organize their expenses using Trips, which is a way of categorizing expenses for various events or areas. Trips are like folders in Abacus.

1. To create a trip, on the left menu, click **Trips**. Then, click **CREATE TRIP** button
2. Enter Trip Name, Start and End Dates and click **CREATE TRIP**.

Note:

- To update a Trip – Click **Trips** on the left-side menu. At selected trip, click the pencil icon and edit Trip details.
- To delete a Trip – Click **Trips** on the left-side menu. At selected trip, click the trash icon.
- When entering an expense and associating it with a Trip:
 - a. Click  **NEW REIMBURSABLE EXPENSE** icon at top right and enter expense details.
 - b. Click **Add Details** > **Trip** and select your Trip.
 - c. Review and complete expense details and click **Send**.

NEED ASSISTANCE?

1. On Abacus desktop application, you can click the help icon  to access Abacus user guides or navigate to the left menu and click **Chat with us!** and type your question.
2. Contact your Conference Sponsor or HHMI Contact.
For HHMI labs, contact your Science Operations Manager.
3. Email askap@hhmi.org for questions or issues.