

# Emburse Card – End-user Experience

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Using Emburse Spend, a Non-Employee Expense Application

# What is **emburse spend** ?

Emburse Spend is the application tool used to process Non-employee HHMI-related business expenses.

Two methods:

1. Submit Reimbursable Expense request
  - for users with U.S. bank account

HHMI-related business expenses must be submitted and processed within 60 days from the date the expense is incurred or the end of the event.

2. Emburse Card (virtual payment card)
  - for users with no U.S. bank account

All Emburse card transactions require a receipt uploaded within 10 days from the date the expense is incurred.

# Roles and Process Overview

- **End user** *Event Attendee or Non-HHMI Employee*
- **Manager** *HHMI Event Organizer, Lab Manager  
Science Operations Team member*
- **Admin** *HHMI Accounts Payable Team member*

# Roles and Process Overview

## Account and Emburse Card Set Up

### Event Organizer/Science Ops

submits AskAP ticket to invite new users to Emburse Spend and requests Emburse card setup.  
Attaches **CSV** and **XLS** files.

### Accounts Payable (Admin)

uploads user data

### End user

receives Emburse Spend email invite and sets up account

### Accounts Payable (Admin)

sets up Emburse Card

**End user** receives Emburse Spend email card-issued and links card to Apple Pay or Google Pay

## Pay with Emburse Card (virtual payment card)

**End user** uses Emburse card for payment. Then, in Emburse Spend, attaches receipt and *Expense's* each transaction.

**Manager** reviews and approves transaction

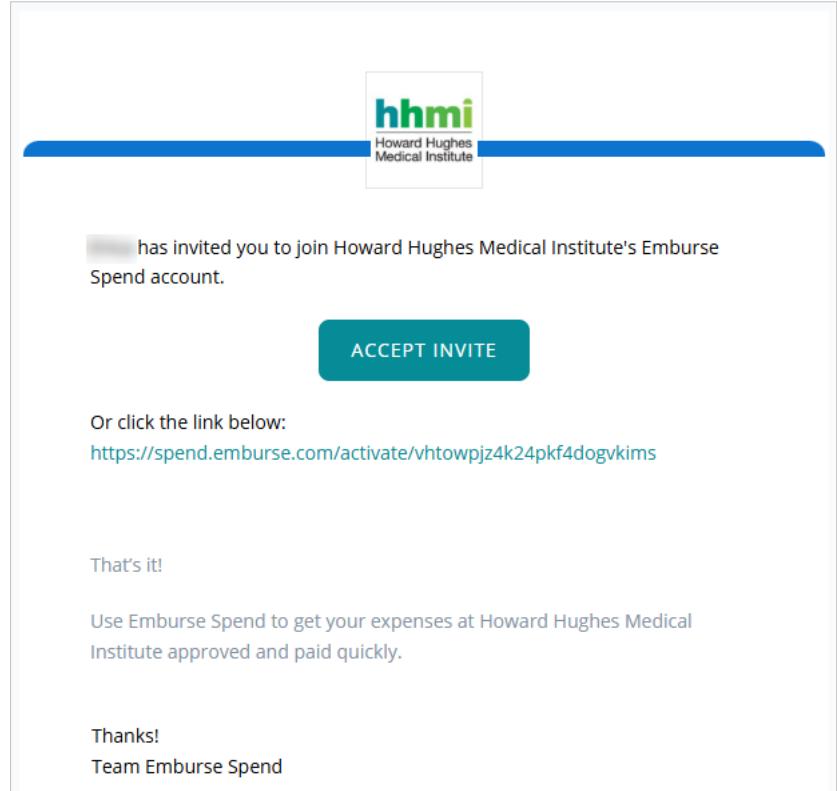
**Accounts Payable (Admin)** reviews and approves transaction

At end of travel period, Emburse Card expires, and **End user** notified

# Account Set Up

# Account Set Up

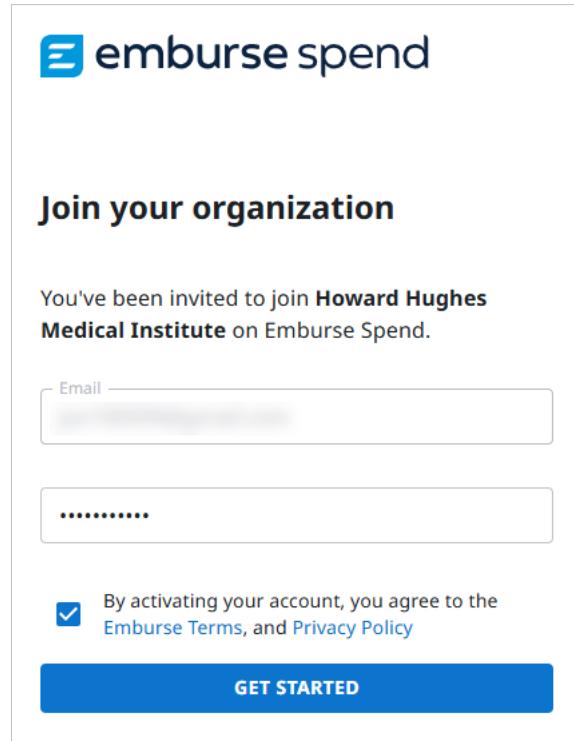
1. Receive email invitation to Emburse Spend
2. Click on **Accept Invite**



The image shows a screenshot of an email invitation. At the top is the Howard Hughes Medical Institute logo, which consists of a blue horizontal bar with the letters 'hhmi' in white on the left, and the full name 'Howard Hughes Medical Institute' in a smaller font on the right. Below the logo, the text reads: 'has invited you to join Howard Hughes Medical Institute's Emburse Spend account.' At the bottom of the email is a teal-colored button with the white text 'ACCEPT INVITE'. Below the button, the text 'Or click the link below:' is followed by a blue hyperlink: 'https://spend.emburse.com/activate/vhtowpjz4k24pkf4dogvkims'. At the very bottom of the email, the text 'That's it!' is followed by 'Use Emburse Spend to get your expenses at Howard Hughes Medical Institute approved and paid quickly.' and 'Thanks!', 'Team Emburse Spend'.

# Account Set Up

3. In blank field, **Create Password**
4. Click on checkbox  
for *Terms and Privacy Policy*
5. Click on **Get Started**

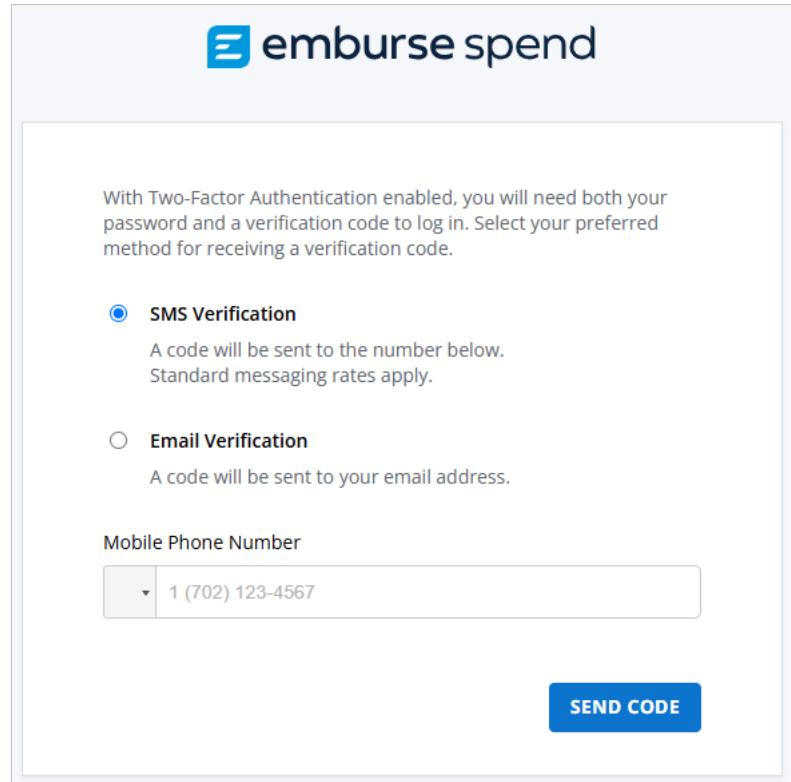


The image shows a screenshot of a web page titled "emburse spend". At the top, there is a logo consisting of a blue square with a white stylized 'E' inside. Below the logo, the text "emburse spend" is written in a dark blue, sans-serif font. The main heading on the page is "Join your organization". Below this, a message states: "You've been invited to join **Howard Hughes Medical Institute** on Emburse Spend." There are two input fields: the first is labeled "Email" and the second is a password field with dots visible. At the bottom, there is a checkbox with a blue checkmark followed by the text: "By activating your account, you agree to the Emburse [Terms](#), and [Privacy Policy](#)". A large blue button with the text "GET STARTED" in white is located at the bottom right.

# Account Set Up

6. Select preferred Two-Factor Authentication method (SMS or Email Verification)

Then, click **SEND CODE**



The screenshot shows a web page for Two-Factor Authentication setup. At the top is the emburse spend logo. Below it is a descriptive text block: "With Two-Factor Authentication enabled, you will need both your password and a verification code to log in. Select your preferred method for receiving a verification code." Two radio button options are presented: "SMS Verification" (selected) and "Email Verification". The "SMS Verification" option includes a note: "A code will be sent to the number below. Standard messaging rates apply." The "Email Verification" option includes a note: "A code will be sent to your email address." Below these options is a "Mobile Phone Number" input field containing the value "1 (702) 123-4567". At the bottom right is a blue "SEND CODE" button.

With Two-Factor Authentication enabled, you will need both your password and a verification code to log in. Select your preferred method for receiving a verification code.

**SMS Verification**  
A code will be sent to the number below.  
Standard messaging rates apply.

**Email Verification**  
A code will be sent to your email address.

Mobile Phone Number

1 (702) 123-4567

**SEND CODE**

# Account Set Up

7. Enter Verification Code from SMS text or Email

Then, click **Enable SFA**



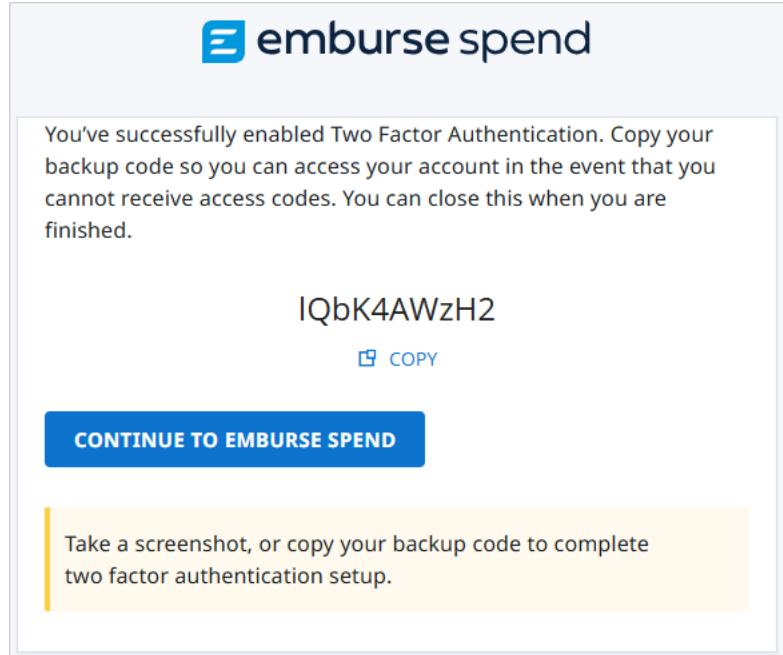
We texted a 6-digit verification code to your mobile number. It may take a minute to arrive

Verification Code

[Back](#) [Enable 2FA](#)

# Account Set Up

8. Click on  
**CONTINUE TO EMBURSE SPEND**



The screenshot shows a confirmation page for enabling Two Factor Authentication. At the top is the emburse spend logo. Below it, a message states: "You've successfully enabled Two Factor Authentication. Copy your backup code so you can access your account in the event that you cannot receive access codes. You can close this when you are finished." A large, bold backup code "IQbK4AWzH2" is displayed in the center. Below it is a "COPY" button with a blue icon. A blue "CONTINUE TO EMBURSE SPEND" button is located below the code. At the bottom, a callout box contains the instruction: "Take a screenshot, or copy your backup code to complete two factor authentication setup." The entire page has a light gray background with a white main content area.

**emburse spend**

You've successfully enabled Two Factor Authentication. Copy your backup code so you can access your account in the event that you cannot receive access codes. You can close this when you are finished.

**IQbK4AWzH2**

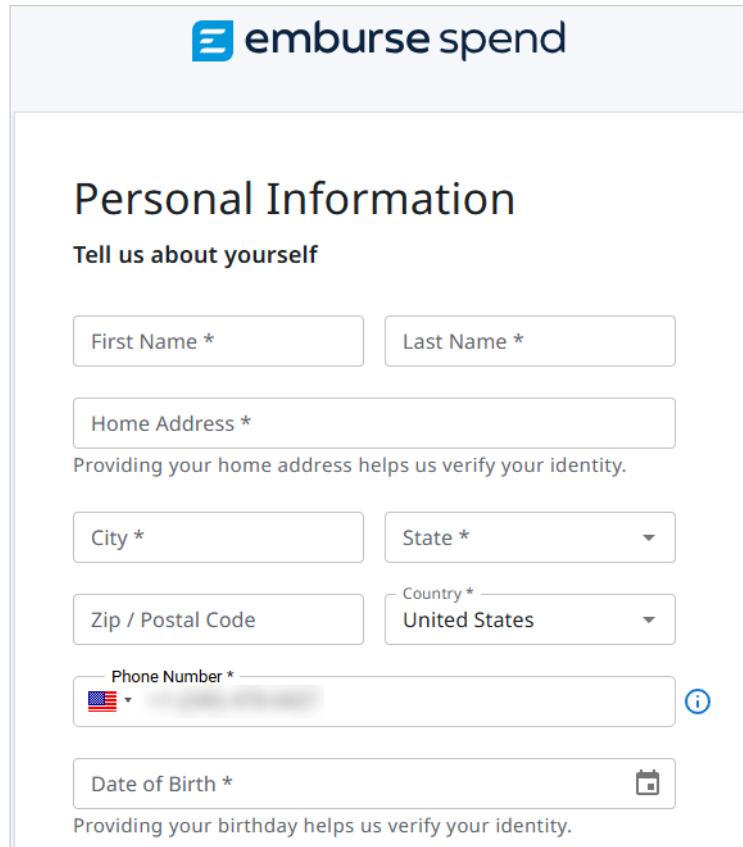
 COPY

**CONTINUE TO EMBURSE SPEND**

Take a screenshot, or copy your backup code to complete two factor authentication setup.

# Account Set Up

9. In the Emburse Spend application, enter your account information
10. Click on **Finish Setting Up**



The screenshot shows the 'Personal Information' section of the Emburse Spend application. The title 'Personal Information' is at the top, followed by the sub-instruction 'Tell us about yourself'. There are several input fields: 'First Name \*' and 'Last Name \*' in separate boxes; a larger box for 'Home Address \*' with the explanatory text 'Providing your home address helps us verify your identity.'; 'City \*' and 'State \*' in separate boxes; 'Zip / Postal Code' and 'Country \*' (set to 'United States') in separate boxes; 'Phone Number \*' with a small info icon and a dropdown menu showing the USA flag; and 'Date of Birth \*' with a calendar icon. Each input field is marked with a red asterisk to indicate it is required.

Personal Information

Tell us about yourself

First Name \*

Last Name \*

Home Address \*

Providing your home address helps us verify your identity.

City \*

State \*

Zip / Postal Code

Country \*  
United States

Phone Number \*

Date of Birth \*

Providing your birthday helps us verify your identity.

# Account Set Up: Receive Virtual Card

11. Next, receive an email indicating your virtual Emburse card has been issued.

Click on **View Cards** to access detailed card information.

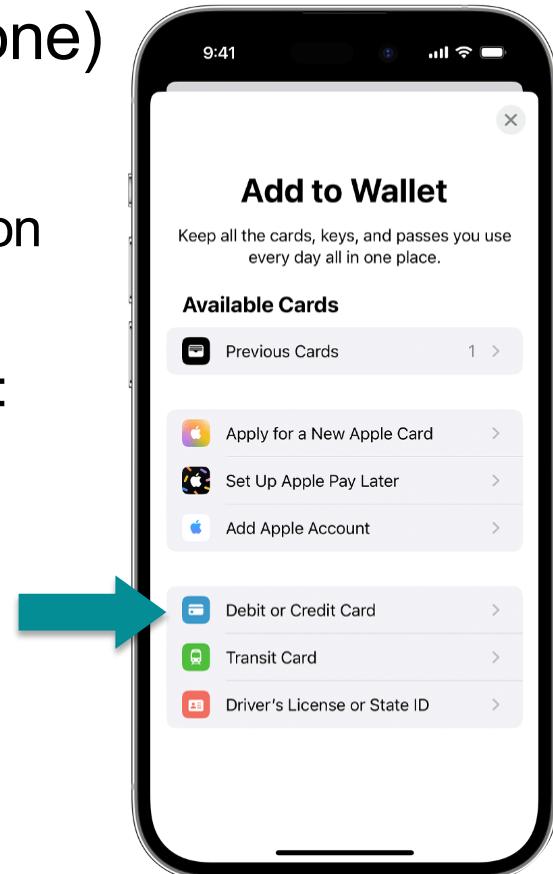
# Account Set Up

## (Add Virtual Card to Apps on your Cell Phone)

12. On your cell phone, add your virtual card information to a mobile *Pay* app for online payment capability.

For more information, click on the app(s) you use:

- Apple Pay on iPhone
- Google Pay on Android
- Uber – ride share app



## Optional – Download the mobile app

# Emburse Spend

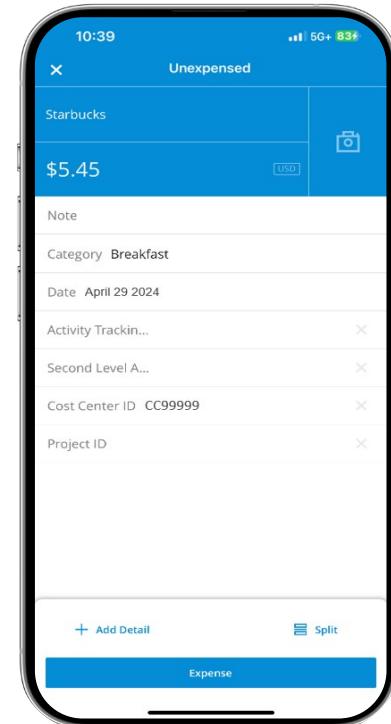


The Emburse Spend mobile app helps you capture and store receipt images, as well as expense transactions on your phone.

On your cell phone,

1. Open an additional email from Emburse Spend and tap the link to download the **Emburse Spend** mobile app.
2. Next, tap Yes to Allow Notification and you are ready to expense transactions.

And, if prompted, enable camera feature to capture/store receipt images.



# Pay with Virtual Emburse Card



You're now ready to pay with your Virtual Emburse Card and use the Emburse Spend application to **UPLOAD** receipts and **Submit** or **Expense** each transaction.

# For each Emburse Card transaction:

1. **Pay with your cell phone's mobile pay app – using your Virtual Emburse Card.** Note:
  - Your card is set up for International card use (currency, fees).
  - If you are prompted to enter HHMI's **zip code**, enter **20815**.
  - If also paying for a tip (for example: Uber or any service), **include tip amount at point of sale** for timely payment, not day(s) later after payment.
2. **Obtain a receipt** to upload (attach) to the transaction in Emburse Spend. Take a photo of the receipt using the Emburse Spend mobile app or your phone / Or save an email/pdf file.

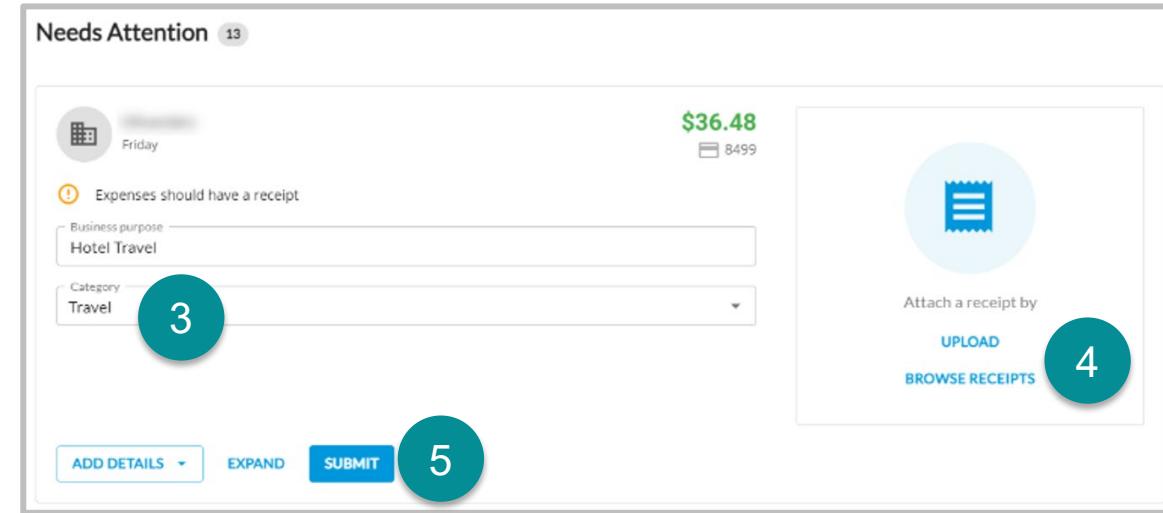
# For each Emburse Card transaction:

3. **In the Emburse Spend application** on your Desktop computer (or cell phone mobile app)
  - a. Review and Edit Transaction
  - b. **UPLOAD** Receipt
  - c. **Submit** or **Expense** the transaction for approval.  
Once approved, transaction is complete.

## Option 1:

# Submit Transaction on Emburse Spend Desktop App

1. On dashboard, view transactions that **Needs Attention** OR click **Transactions** on left menu.



2. Click on a transaction, **Pending Submission**
3. Select **Category**, if blank
4. **UPLOAD** or **BROWSE RECEIPTS** to attach receipt image or file
5. Click on **Submit**

Repeat steps for each **Transaction** that is **Pending Submission**.

## Option 2:

# Expense Transaction on Emburse Spend Mobile App

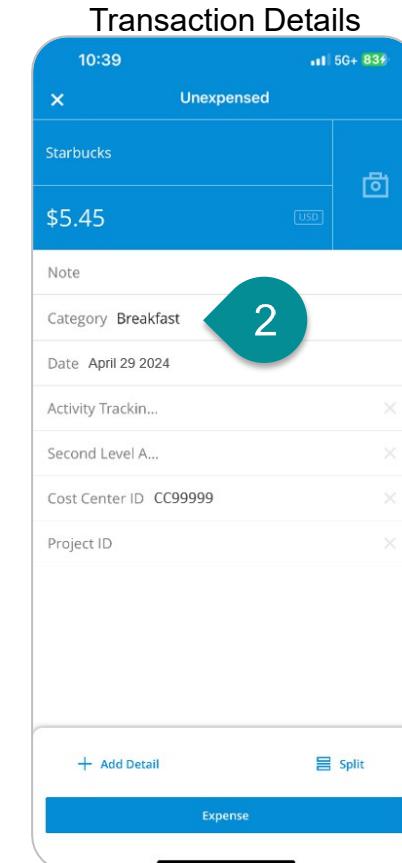
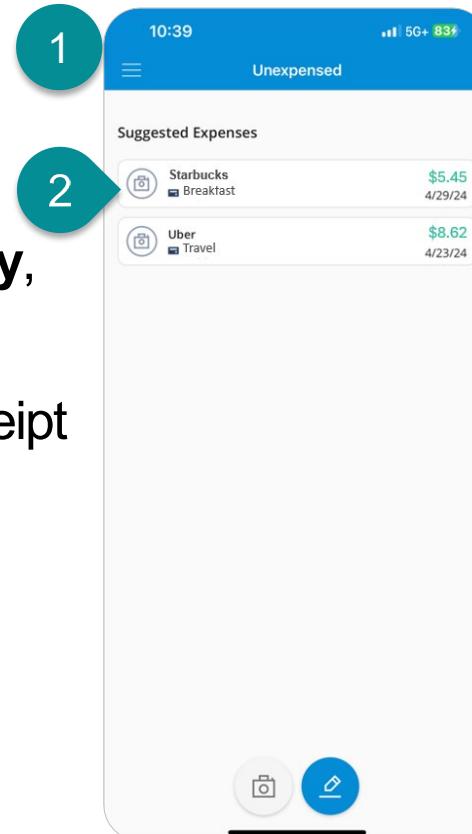
1. View **Unexpensed** transactions

2. Tap a transaction to view details and select **Category**, if blank

3. Tap camera icon to add receipt  
(Receipts, Choose from Library, Take a Photo)

4. Tap **Send**

Repeat steps for each **Unexpensed** transaction.



3

2

4

# Frequently Asked Questions (FAQs)

**When is my card active?**

Your card is active 1-2 days prior to your days of travel.

**When does my card expire?**

It expires 1 day after the last day of travel. You will receive an email notification when card expires. Additionally, remember to remove the virtual Emburse card from any of your mobile apps that you linked it to.

**Do I need to save my receipts?**

Yes. They are required and must be attached to every virtual card transaction.

**How long do I have to upload a receipt and add a tip?**

A receipt should be uploaded within days of returning from the trip in order for timely reconciliation with full approval. And if a tip is added – for rideshare service (Uber) or any service, you must include the tip amount at the point of sale for timely payment, not day(s) later after services rendered.

**How does my card handle foreign transaction fees?**

Your Emburse virtual card is set up to handle foreign transaction fees. Learn more about Emburse [International Card Use](#).

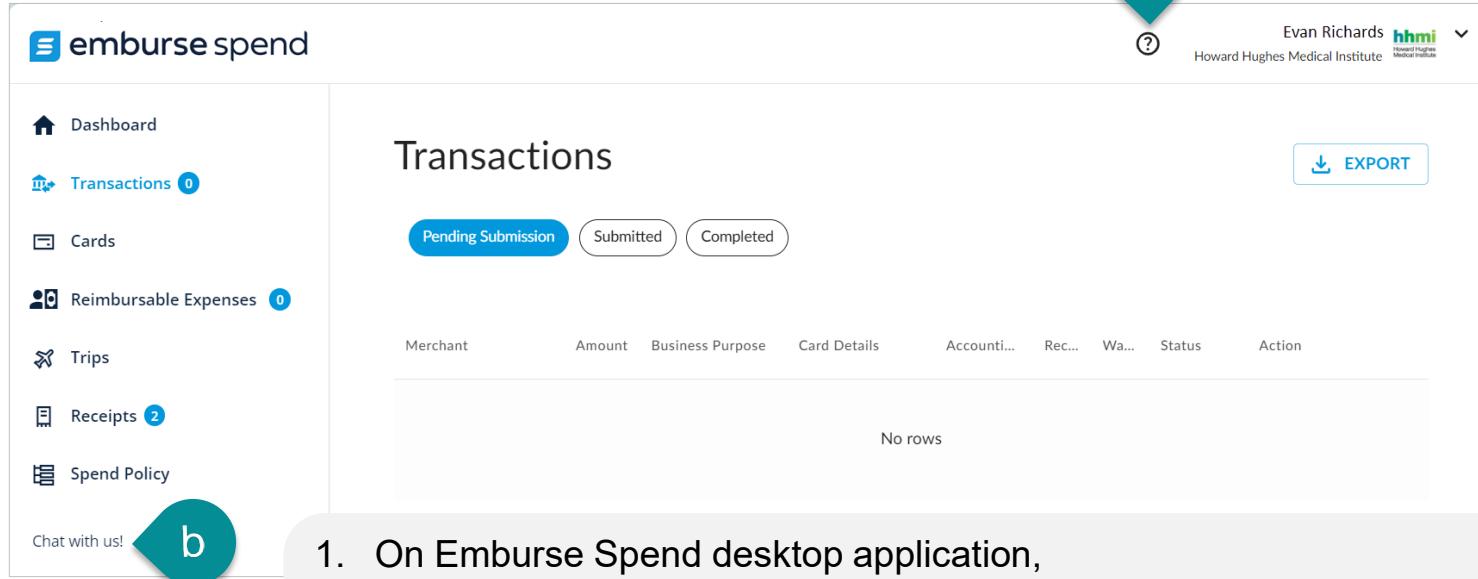
# Frequently Asked Questions (FAQs)

**Can I review transaction history?** Yes. In the Emburse desktop application, click **Transactions** on the left menu to see all transaction history. Contact your event coordinator if you need assistance.

**What if I travel again for HHMI?** Your event coordinator will let HHMI know, and we will issue you a new card.

**What if I have to use my own funds?** HHMI will reimburse you. Save all your receipts.

# Need Assistance?



emburse spend

Evan Richards  Howard Hughes Medical Institute

Dashboard

Transactions 0

Cards

Reimbursable Expenses 0

Trips

Receipts 2

Spend Policy

Chat with us!

## Transactions

Pending Submission Submitted Completed

Merchant	Amount	Business Purpose	Card Details	Account...	Rec...	Wa...	Status	Action
No rows								



1. On Emburse Spend desktop application,
  - a. Click on the help icon ② at the top right to access Emburse Spend user guides, or
  - b. Click on **Chat with us!** on left menu and type your question.
2. Contact your Event Coordinator or HHMI Contact.
3. Email [askap@hhmi.org](mailto:askap@hhmi.org) for questions or issues.

# Online Resources

- Uploading Receipts – Emburse Spend Help Center  
(use your internet browser's translate feature to view content in other languages if needed.)
- Transactions – Emburse Cards Help Center  
(click menu icon ≡ to view in English and Spanish)
- Doing Business with HHMI  
for Non-Employee Expense guidance and resources