

EMBURSE SPEND: EMBURSE CARD – END USER GUIDE

As a Non-Employee at HHMI, learn how to use the Virtual Emburse Card for HHMI Business-related expenses. This virtual payment card is applicable to non-employees who do not have a U.S. bank account. Note all Emburse card transactions require a receipt uploaded within 10 days from the date the expense is incurred.

SET UP YOUR EMBURSE SPEND ACCOUNT

1. Receive email from hi@spend.emburse.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 EMBURSE SPEND**.
4. **Set Up Your Personal Account** by entering your account info and click **Finish Setting Up**
5. Next, receive an email indicating your virtual Emburse card has been issued. Click **View Cards** to access detailed card information.
6. 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.
7. **Download the Emburse Spend mobile app** (optional) – On your cell phone, open an additional email from Emburse Spend and tap the link to download the mobile app. This app helps you capture and store receipt images, as well as expense transactions on your cell phone.

Next, tap **Yes** to Allow Notification and you are ready to expense transactions. Also, if prompted, enable camera feature to capture/store receipt images.

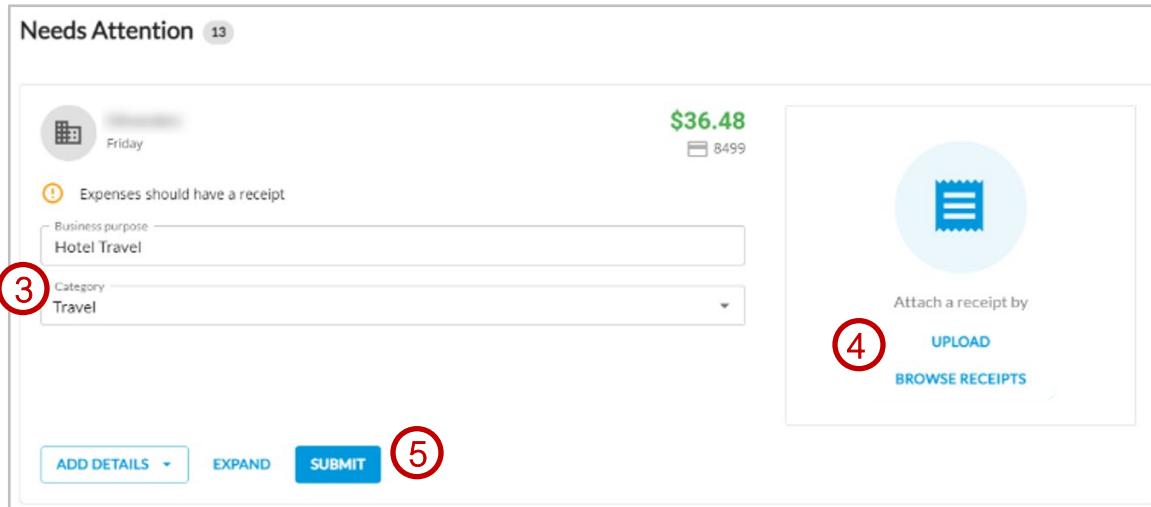
PAY WITH VIRTUAL EMBURSE CARD

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 services rendered.
2. **Obtain a receipt** to upload (attach) to the transaction in the Emburse Spend application. Take a photo of the receipt using the Emburse Spend mobile app, or your phone / Or save an emailed receipt/pdf file.
3. In the Emburse Spend application on desktop computer (or cell phone mobile app)
 - a. Review and Edit Transaction (Select **Category**)
 - b. **UPLOAD Receipt**
 - c. **Submit or Expense** Transaction for approval. Once approved, the transaction is complete.

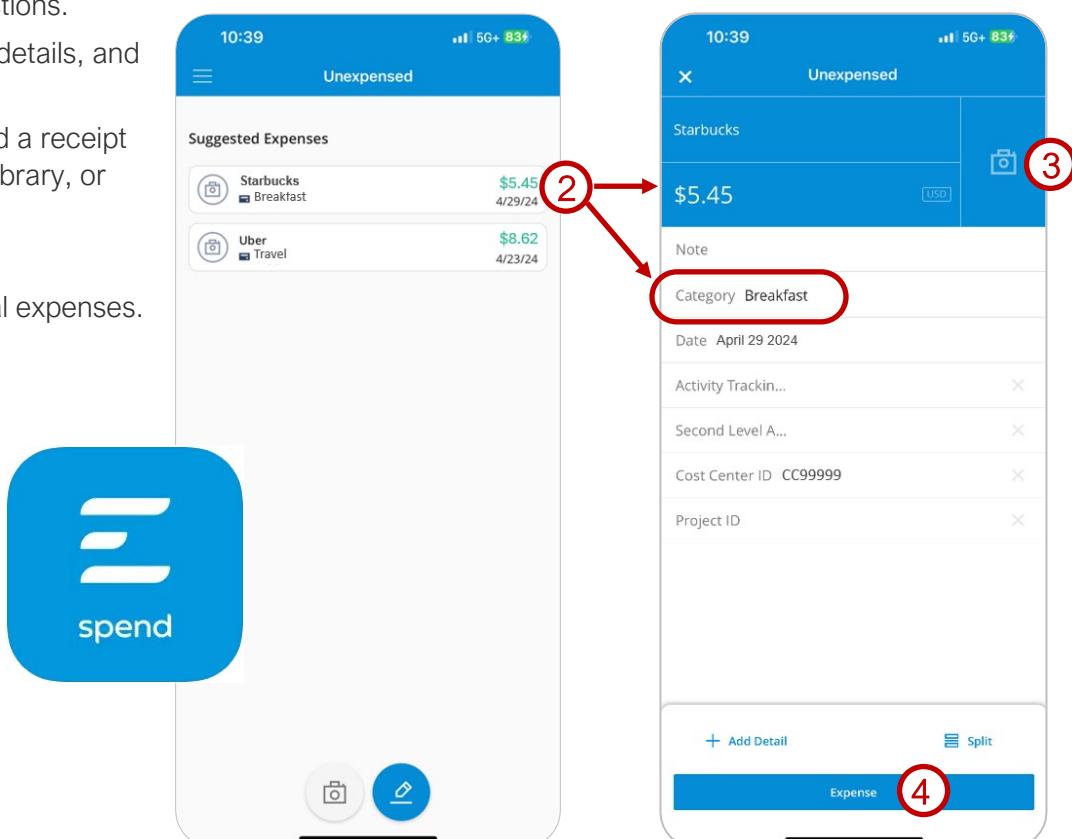
OPTION 1: SUBMIT TRANSACTION IN EMBURSE SPEND – ON DESKTOP COMPUTER

1. On dashboard, view transactions that **Needs Review**, or click **Transactions** on left menu.
2. Click on a transaction that is **Pending Submission**.
3. Review transaction details and select **Category**, if blank.
4. Click on **UPLOAD** or **BROWSE RECEIPTS** to attach receipt images and files.
5. Click on **Submit**. Repeat steps for each **Transaction** that is **Pending Submission**.



OPTION 2: EXPENSE TRANSACTION IN EMBURSE SPEND – ON CELL PHONE MOBILE APP

1. View **Unexpensed** transactions.
2. Tap a transaction to view details, and select **Category**, if blank.
3. Tap camera icon to upload a receipt (Receipts, Choose from Library, or Take a Photo)
4. Tap **Send** to submit.
Repeat steps for additional expenses.



FREQUENTLY ASKED QUESTIONS

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. Additionally, remember to remove the virtual Emburse card from any of your mobile apps that you linked it to (i.e., Apple Pay, Google Pay, Uber, etc.).

Do I need to save my receipts?

Yes. They are required and must be attached to the 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](#).

Can I review transaction history?

Yes. In the Emburse Spend 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?

For assistance in how to use Emburse Spend or Emburse virtual card, click on the help icon  at the top right to access Emburse Spend user guides or go to the left menu and click on **Chat with us!** and type your question.

Here are some helpful sites:

- [Transactions – Emburse Cards Help Center](#)
Click menu icon  to view in English and Spanish.
- [Uploading Receipts – Emburse Spend Help Center](#)
Use your internet browser's translation feature to view content in other languages if needed.

For any issues with Emburse Spend, contact your HHMI Contact or email askap@hhmi.org.