

Submit Reimbursable Expense – End-user Experience

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

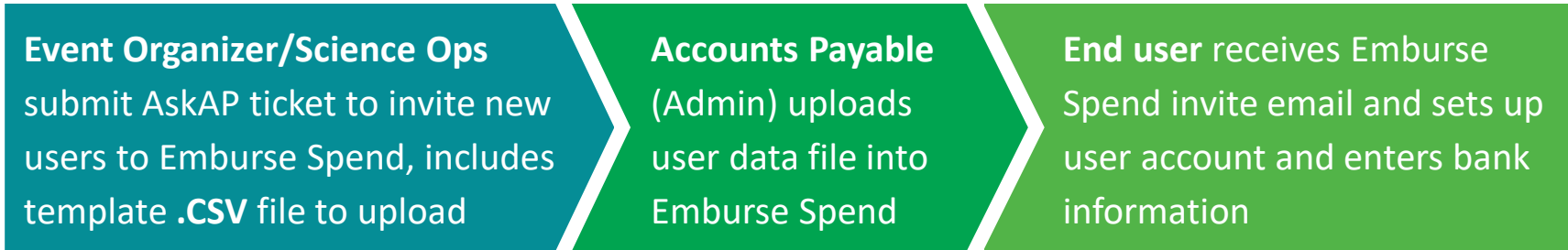
All Emburse card transactions require a receipt uploaded within 10 days from the date the expense is incurred.

Roles and Process Overview

- **End user** *Event Attendee or Non-HHMI Employee*
- **Manager** *HHMI Event Organizer, Lab Manager or Science Operations Team member*
- **2nd Level Approver** *HHMI Event Organizer, Lab Manager or Science Operations Team member*
(If applicable)
- **Admin** *HHMI Accounts Payable Team member*

Reimbursable Expense – Process Overview

Account Set Up



Submit Reimbursable Expense

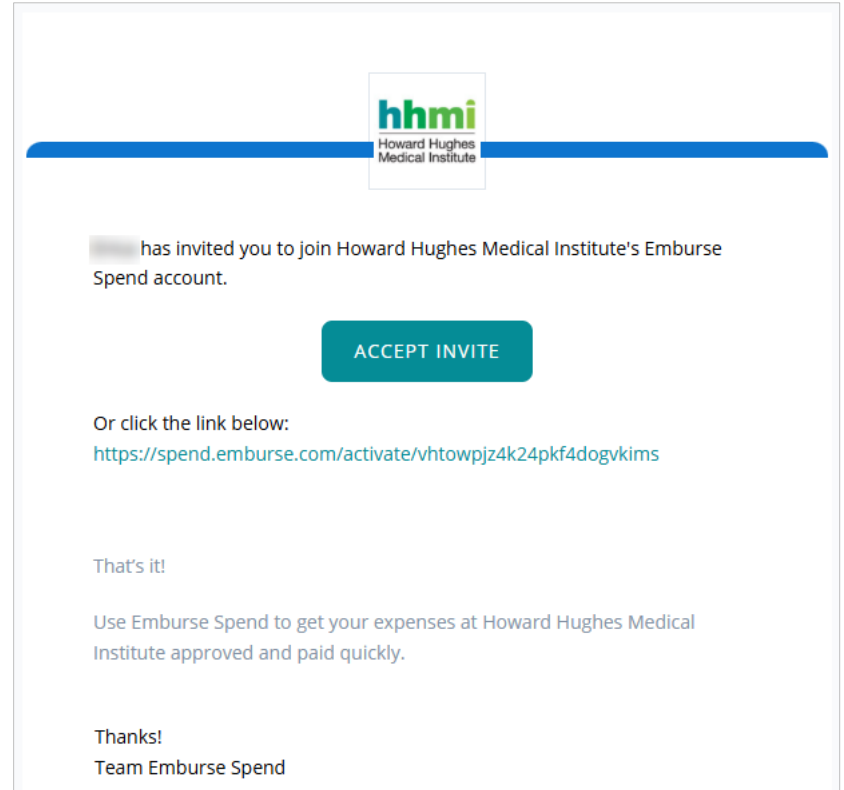


- End user receives email notification when expense is submitted, approved, and awaiting payment.
- Approver (Manager, Admin) receives email notification when expense is pending their approval.
- Expense must be fully approved daily for non-employee end user to be paid in 7-10 business days.

Account Set Up


Account Set Up

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



Account Set Up

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



Join your organization

You've been invited to join **Howard Hughes Medical Institute** on Emburse Spend.

Email

.....


☒ By activating your account, you agree to the [Emburse Terms](#), and [Privacy Policy](#)

GET STARTED

Account Set Up

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

Then, click **SEND CODE**



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

▼

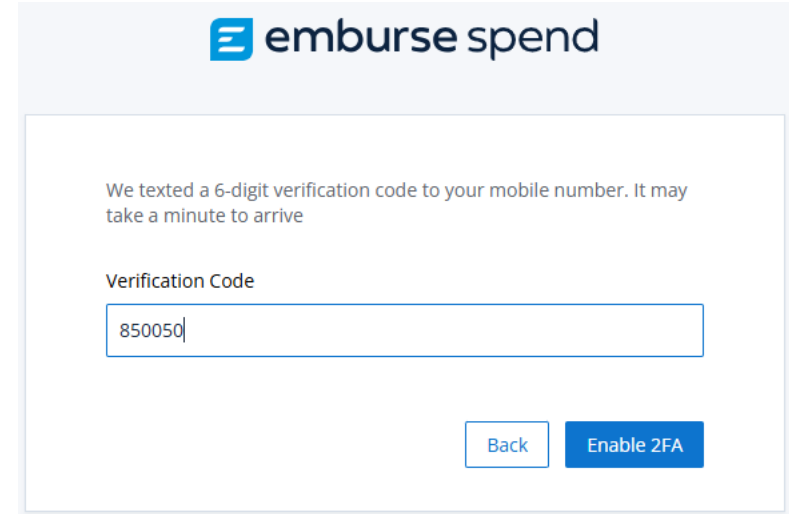
1 (702) 123-4567

SEND CODE

Account Set Up

7. Enter Verification Code
from SMS text or Email

Then, click **Enable SFA**



The screenshot shows a web interface for 'emburse spend'. At the top, there is a header with the 'emburse spend' logo. Below the header, a message states: 'We texted a 6-digit verification code to your mobile number. It may take a minute to arrive'. Underneath this message, the text 'Verification Code' is followed by a text input field containing the code '850050'. At the bottom right of the form, there are two buttons: a 'Back' button and an 'Enable 2FA' button.

emburse spend

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

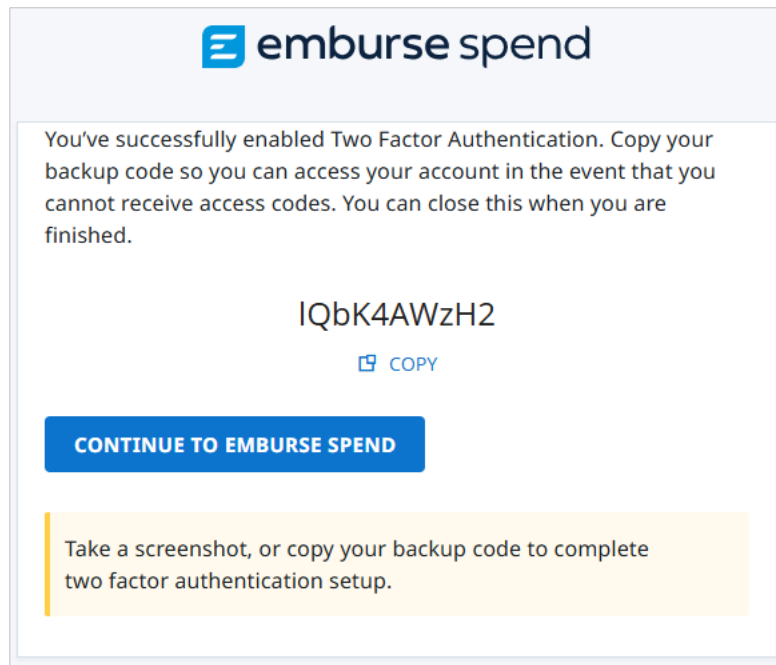
Verification Code

850050

Back Enable 2FA


Account Set Up

8. Click on
CONTINUE TO EMBURSE SPEND



Account Set Up

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



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

11. Click on **Bank Account**
12. Click on
+CONNECT BANK
13. Enter your US-based
Bank Account information
14. Click on **ADD ACCOUNT**

The screenshot shows a web application interface for connecting a bank account. On the left is a sidebar menu with options: 'Account Information', 'Bank Account' (highlighted), 'Bank Transfer History', 'Security', 'Email Accounts', and 'Notification Settings'. The main content area has a header 'Connect your personal bank account to get reimbursed. [Learn more](#)' and a blue button '+ CONNECT BANK'. A modal window titled 'Connect Bank' is open, featuring a check image with red boxes highlighting the routing and account numbers. Below the check are input fields for 'Name on Account', 'Routing Number (ACH)', 'Account Number', and 'Confirm Account Number'. A dropdown menu 'Select An Item*' is set to 'Checking'. At the bottom right of the modal are 'CANCEL' and 'ADD ACCOUNT' buttons.

Account Information

Bank Account

Bank Transfer History

Security

Email Accounts

Notification Settings

Connect your personal bank account to get reimbursed. [Learn more](#)

+ CONNECT BANK

Connect Bank

Benjamin Franklin
100 Main St 123

PAY TO THE ORDER OF _____ DOLLARS

000000000 55555555 23

Routing No. Account No.

Name on Account _____

Routing Number (ACH) _____

Account Number _____

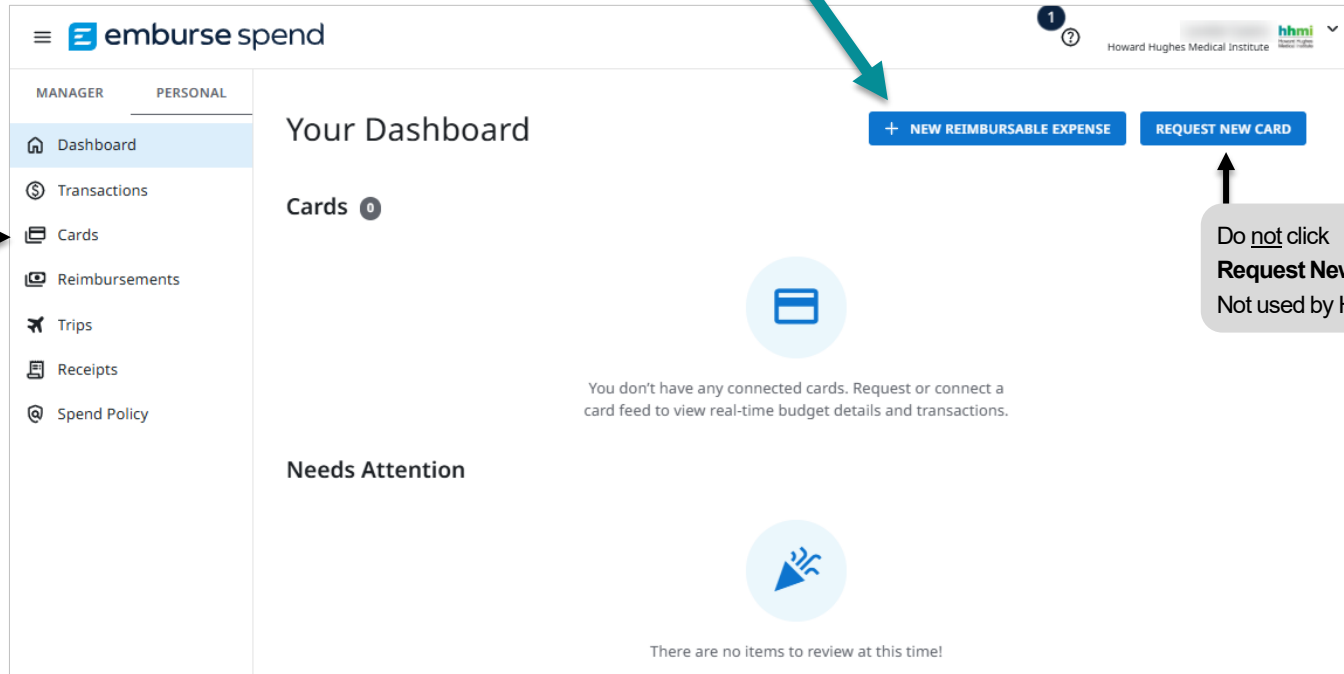
Confirm Account Number _____

Select An Item*
Checking

CANCEL **ADD ACCOUNT**

Account Ready for Use

Your account set up is done and you are now ready to submit reimbursable expenses from the dashboard.



Submit Reimbursable Expense

Submit Reimbursable Expense

1. Click **+ NEW REIMBURSABLE EXPENSE**

2. Enter expense details

Amount • Merchant/Mileage •
Category • Note • Date

3. If expense \$50 or more, attach receipt

4. Click **Create**

5. Receive email when expense is
Submitted • Approved • Awaiting Payment

emburse
abacus

Your Dashboard

Cards

Need

STARBUCKS Store #301
1912 Pike Place
Seattle, WA (206) 448-9762

CHK 657775
01/10/2023 07:14 AM
1965634 Drawer: 2 Reg: 2

Sh Mlt Mocha 3.25
Visa 3.56
XXXXXXXXXXXX

Subtotal \$3.25
Tax 9.5% \$0.31
Total \$3.56
Change Due \$0.00

----- Check Closed -----
01/10/2023 07:14 AM

Try the NEW Caramel Flan Latte
Combining our signature
espresso, freshly steamed milk

New Reimbursable Expense

Amount *
\$ 3.56 USD

Merchant / Mileage *
Starbucks

Category
Breakfast

Date
01/10/2023

Business Purpose
Science Meeting Jan 10-13, 2023

Activity Tracking ID
AT100000003

Cost Center ID
CC10830

Project ID
PER-16-00001

ADD DETAIL

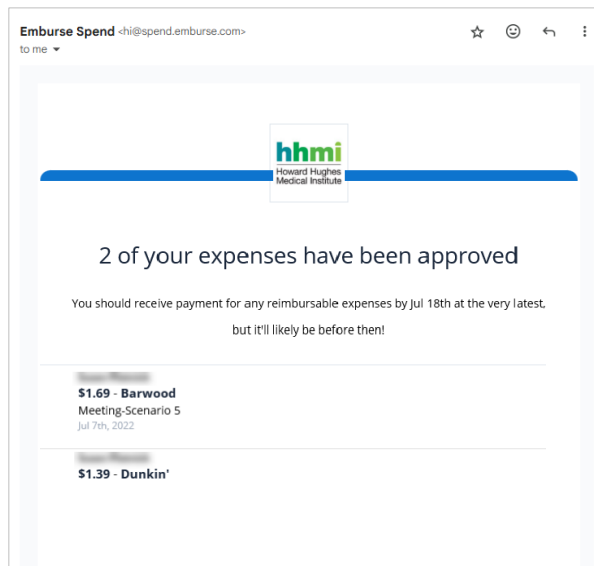
SPLIT / ITEMIZE

CANCEL

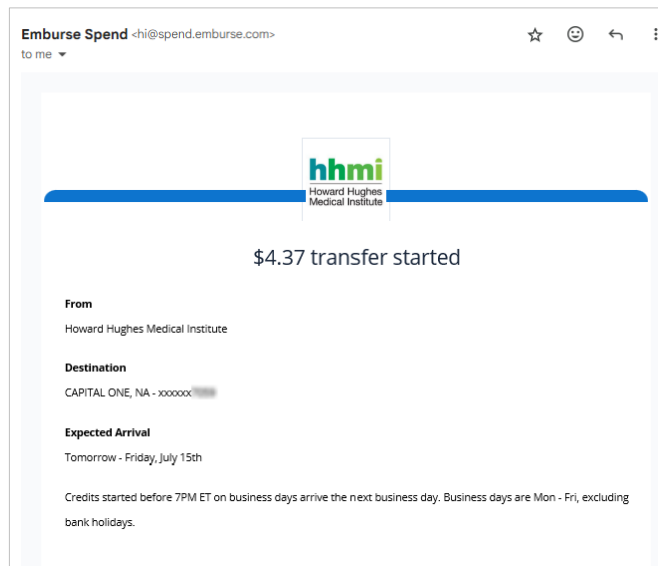
CREATE

Email Approval/Payment

Expense Approved



Payment: Bank Transfer Started



Note: Expense must be fully approved daily for non-employee end user to be paid in 7-10 business days.

Review Transactions

1. Click **Transactions** to view your expenses in each status.
2. Click on a transaction to view details, including its **PROGRESS** in the process.

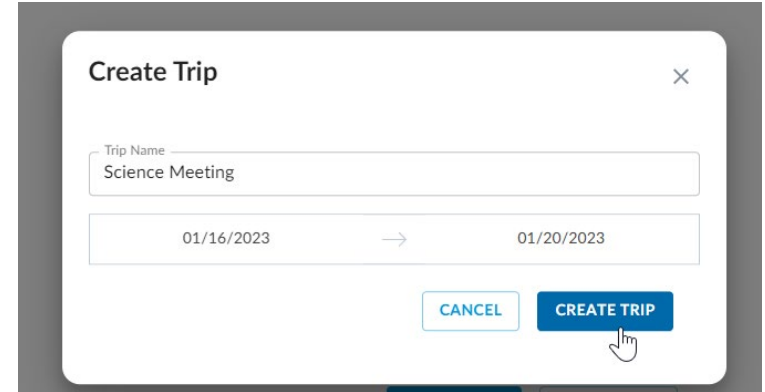
Create Trip (Category)

Optional

1. Click on **Trips** on left-side menu
2. Enter **Trip Name** and dates
3. Click on **CREATE TRIP**

Note:

Click **Trips** to manage all your trips (categories).



The screenshot shows a 'Create Trip' modal window. At the top left is the title 'Create Trip' and a close button 'X'. Below the title is a text input field labeled 'Trip Name' containing the text 'Science Meeting'. Underneath the name field is a date range selector showing '01/16/2023' followed by a right-pointing arrow and then '01/20/2023'. At the bottom right of the form are two buttons: a light blue 'CANCEL' button and a dark blue 'CREATE TRIP' button. A mouse cursor is pointing at the 'CREATE TRIP' button.

Link Expense to Trip

Optional

1. On Transaction detail's view, click on **Add Detail**
2. Click on **Trip**
3. Select Trip
4. When expense details are completed, click on **Send**

The screenshot displays the transaction detail view for a Starbucks expense. The top section shows the amount \$3.56 in USD. Below this, the merchant name 'Starbucks' is listed. The form includes fields for Category (Breakfast), Note (Business purpose...), Date (1/10/23), and Trip (Select...). A dropdown menu is open for the Trip field, showing two options: 'BI-weekly Lab Meeting - Feb 1' and 'Science Meeting - Jan 16'. A red circle with the number 1 is placed over the 'Add Detail' button, and a red circle with the number 2 is placed over the 'Science Meeting - Jan 16' option. To the right of the form is a receipt image from Starbucks Store #301, dated 01/10/2023 07:14 AM, showing a total of \$3.56. A red circle with the number 3 is placed over the 'Send' button at the bottom right.

Category	Breakfast
Note	Business purpose...
Date	1/10/23
Trip	Select...

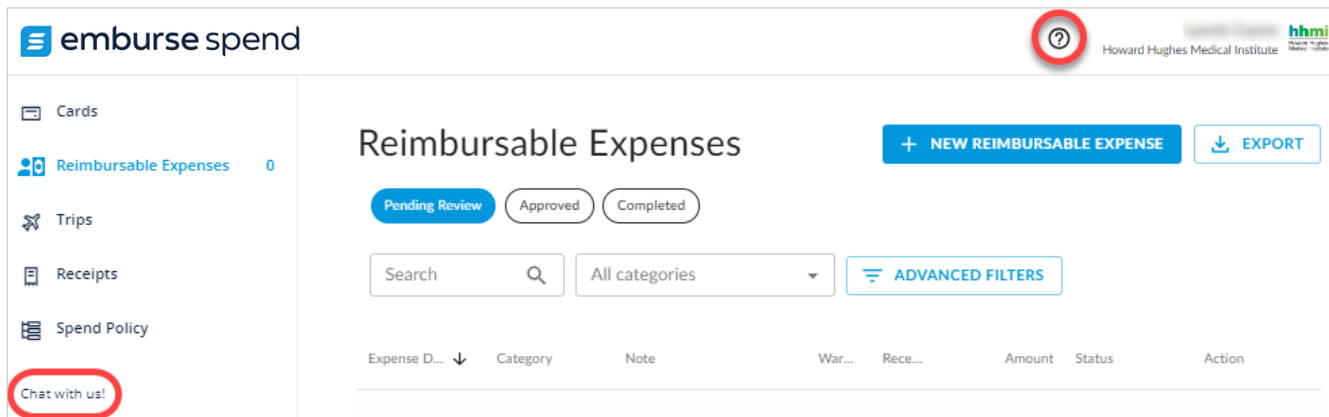
1

2

3

Cancel Send

Need Assistance?



1. On Emburse Spend desktop application,
 - a. Click on the help icon (?) 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.
For Host Institutions, contact your Science Operations Manager.
3. For any system issues, [submit an AskAP ticket](#).