

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
(If applicable)** *HHMI Event Organizer, Lab Manager or Science Operations Team member*
- **Admin** *HHMI Accounts Payable Team member*

Reimbursable Expense – Process Overview

Account Set Up

Event Organizer/Science Ops

submit AskAP ticket to invite new users to Emburse Spend, includes template .CSV file to upload

Accounts Payable

(Admin) uploads user data file into Emburse Spend

End user receives Emburse

Spend invite email and sets up user account and enters bank information

Submit Reimbursable Expense

End user
submits
expense
request

Manager reviews and approves request
If applicable, 2nd approval follows after

Accounts Payable
(Admin) reviews and approves request

End user
paid

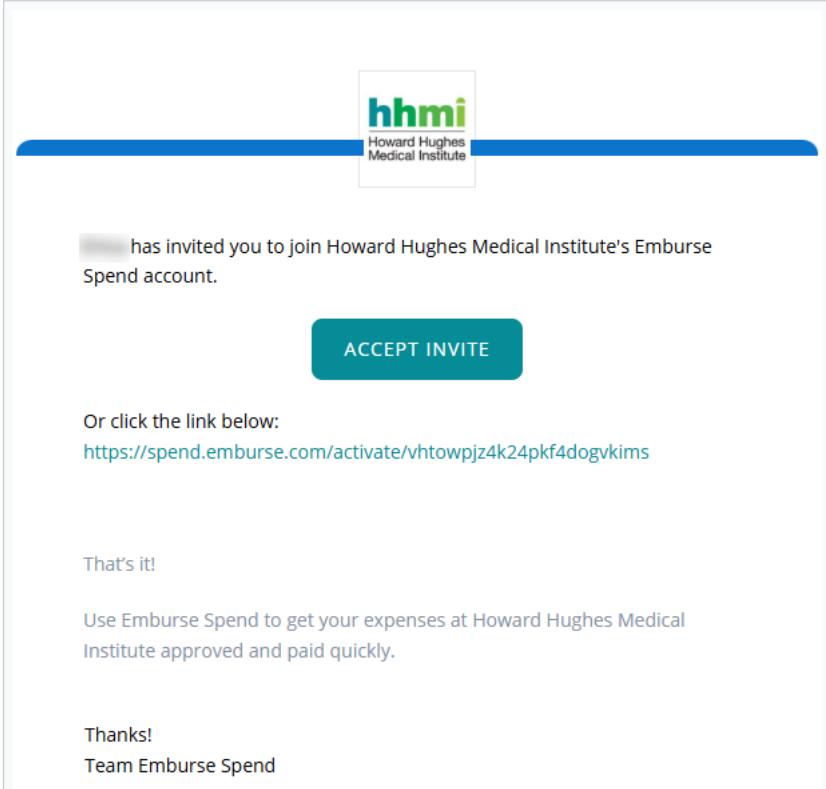
Bank Team runs Ad hoc Bank Transactions into Workday

- 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

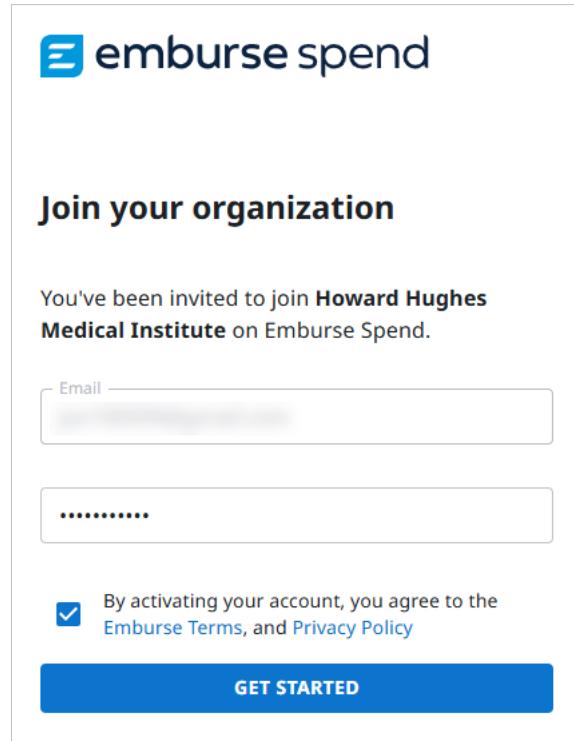
1. Receive email invitation to Emburse Spend
2. Click on **Accept Invite**



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**



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**



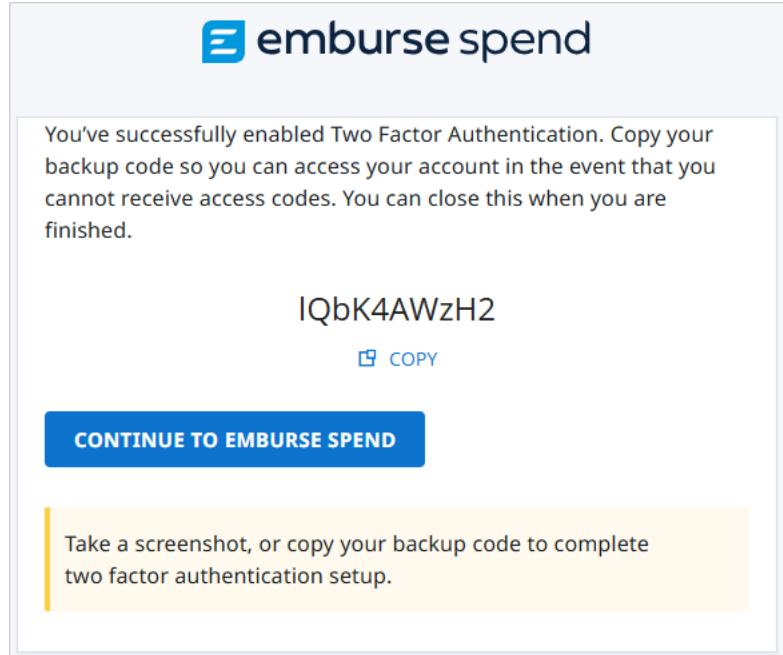
We texted a 6-digit verification code to your mobile number. It may take a minute to arrive

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 yellow callout box contains the instruction: "Take a screenshot, or copy your backup code to complete two factor authentication setup."

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

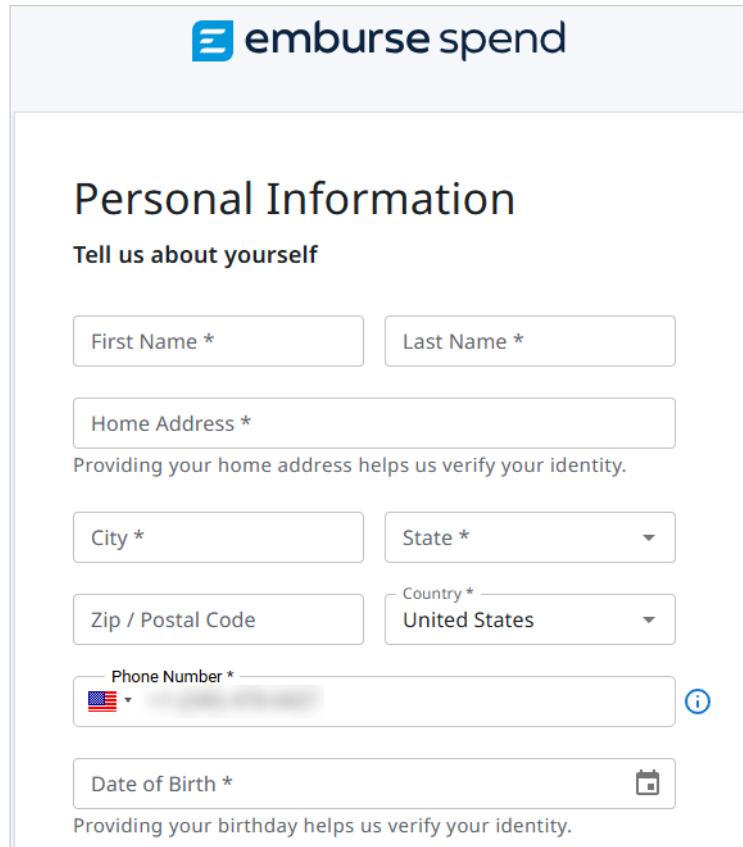
 COPY

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'. The form contains the following fields: 'First Name *' and 'Last Name *' (both required), 'Home Address *' (with a note: 'Providing your home address helps us verify your identity'), 'City *' and 'State *' (with a dropdown arrow), 'Zip / Postal Code' and 'Country *' (set to 'United States' with a dropdown arrow), 'Phone Number *' (with a small info icon and a dropdown arrow), and 'Date of Birth *' (with a calendar icon). A note below the date of birth field says 'Providing your birthday helps us verify your identity.'

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

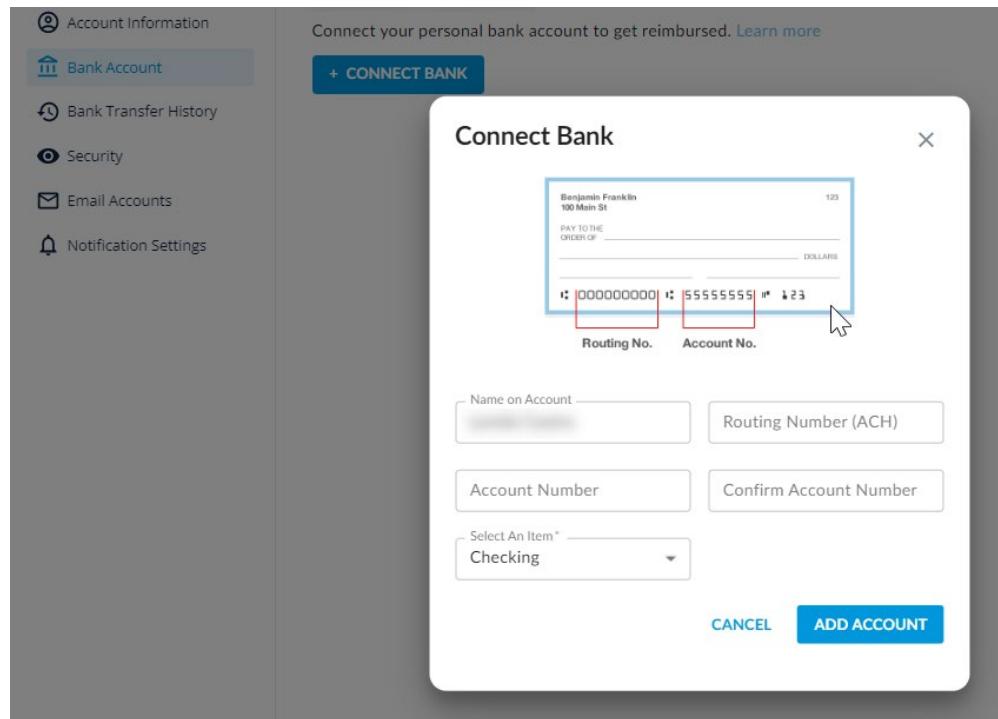
Phone Number *

Date of Birth *

Providing your birthday helps us verify your identity.

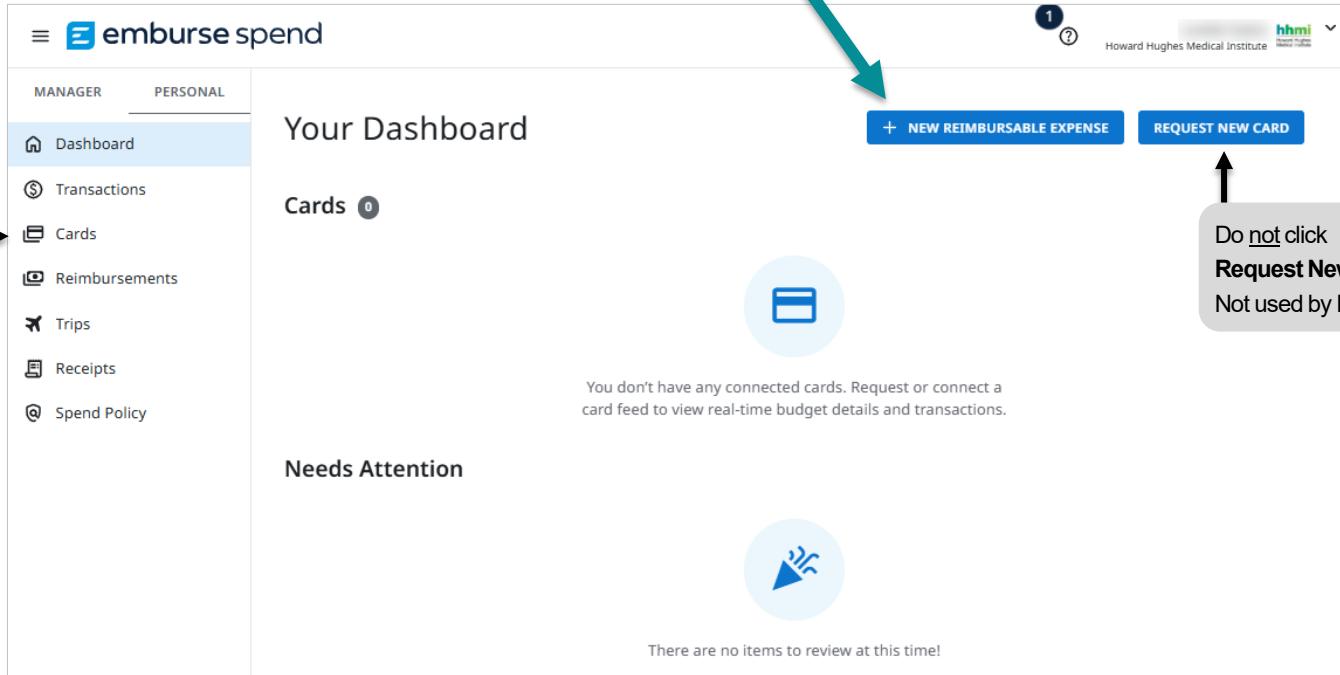
Account Set Up

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



Account Ready for Use

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



The screenshot shows the emburse spend dashboard. The top navigation bar includes the emburse logo, a user icon with a '1' notification, the text 'Howard Hughes Medical Institute', and a dropdown menu. The main content area is titled 'Your Dashboard' and features a sidebar with 'MANAGER' and 'PERSONAL' tabs, and links for 'Dashboard', 'Transactions', 'Cards', 'Reimbursements', 'Trips', 'Receipts', and 'Spend Policy'. A callout box on the left says 'Do not click **Cards** → to set up bank account info.' A large blue arrow points from the 'Cards' link in the sidebar to the 'REQUEST NEW CARD' button in the top right. Another callout box on the right says 'Do not click **Request New Card**. Not used by HHMI.' The 'Cards' section shows '0' cards and a message: 'You don't have any connected cards. Request or connect a card feed to view real-time budget details and transactions.' The 'Needs Attention' section shows a speaker icon and the message: 'There are no items to review at this time!'. The top right of the dashboard has two buttons: '+ NEW REIMBURSABLE EXPENSE' and 'REQUEST NEW CARD'.

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

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

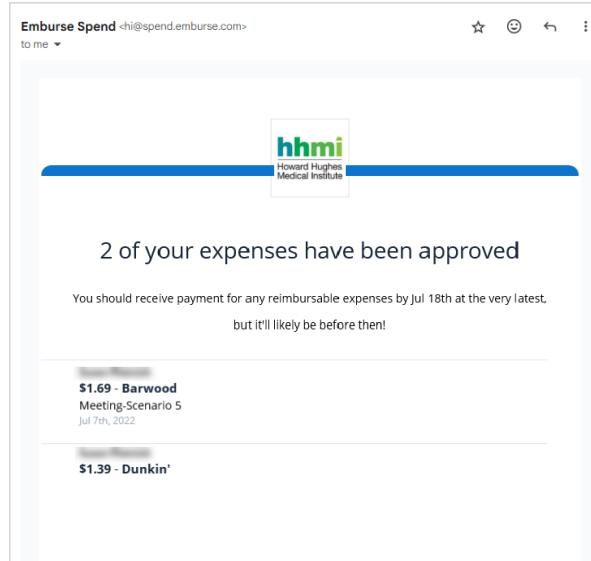
ADD DETAIL SPLIT / ITEMIZE

CANCEL CREATE

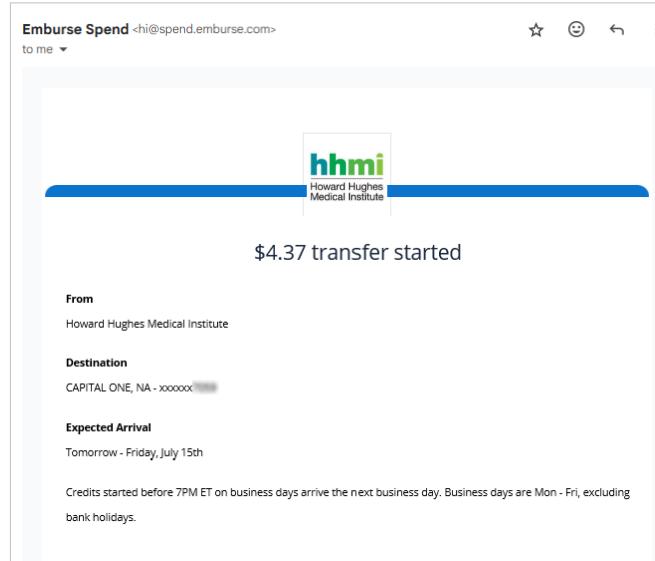
4

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.

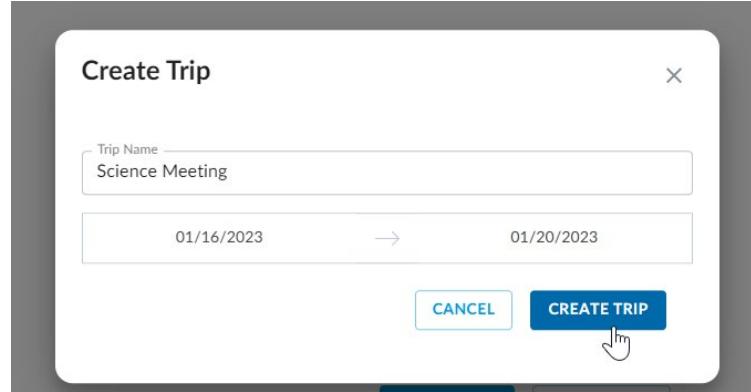
Review Transactions

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**



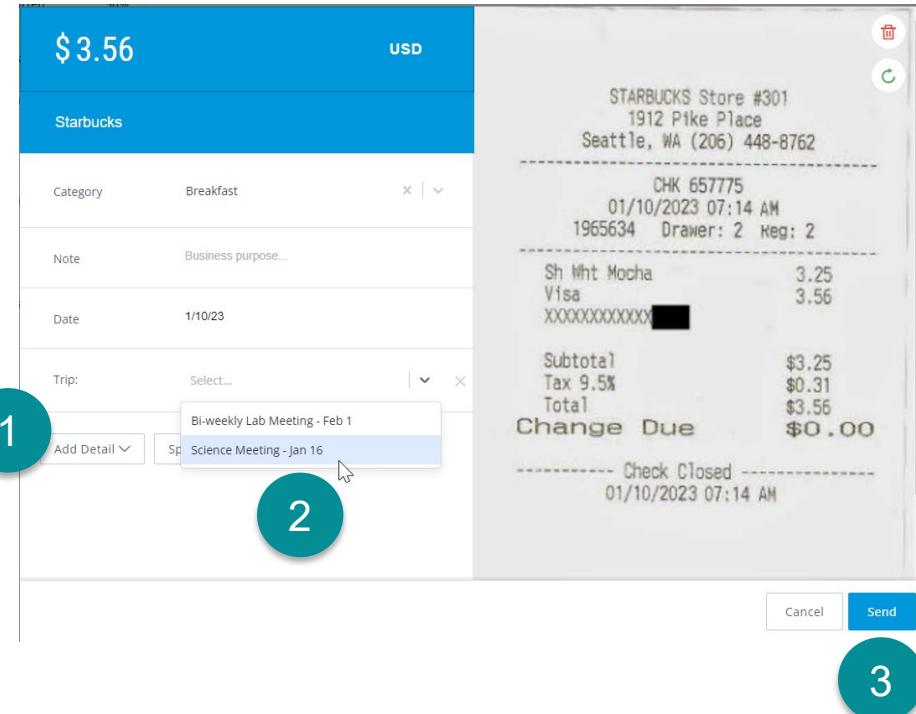
Note:

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

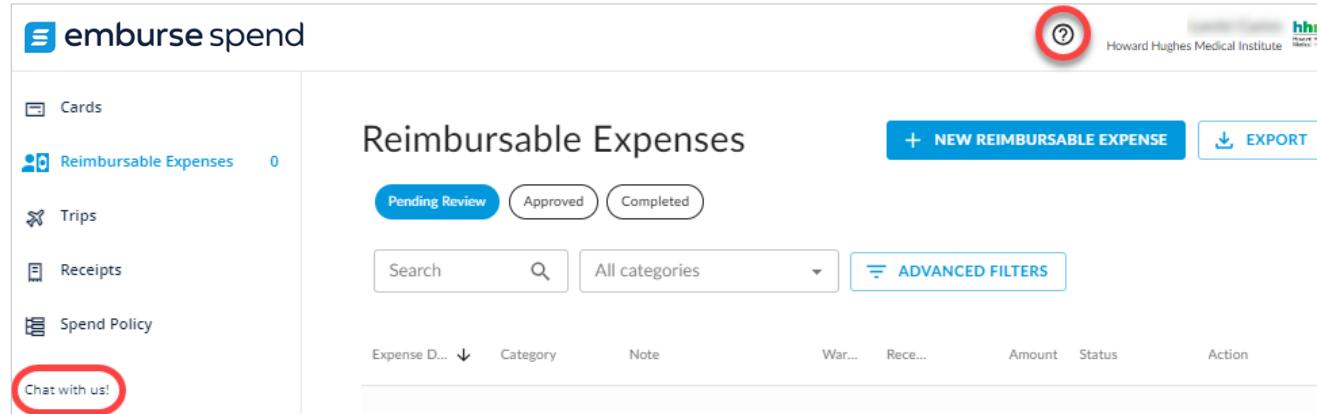
Link Expense to Trip

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**



Need Assistance?



emburse spend

Howard Hughes Medical Institute hhmi

Reimbursable Expenses

+ NEW REIMBURSABLE EXPENSE EXPORT

Pending Review Approved Completed

Search All categories ADVANCED FILTERS

Expense D... Category Note War... Rece... Amount Status Action

Chat with us!

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.
For Host Institutions, contact your Science Operations Manager.
3. For any system issues, [submit an AskAP ticket](#).