EMBURSE SPEND: SUBMIT REIMBURSABLE EXPENSE – END USER GUIDE

As a Non-Employee at HHMI, learn how to submit an HHMI Business-related Expense for Reimbursement. This method is applicable to non-employees with a U.S. bank account. Expenses in the amount of $50 or more require a receipt to be attached. And expenses must be submitted and approved within 60 days from the date the expense is incurred or the end of an event. Reference Payment of Travel and Other Business Expenses.

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. In Emburse Spend, 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 Emburse Spend app** (Optional) – On your cell phone, open a second 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 submit expenses on your cell phone.

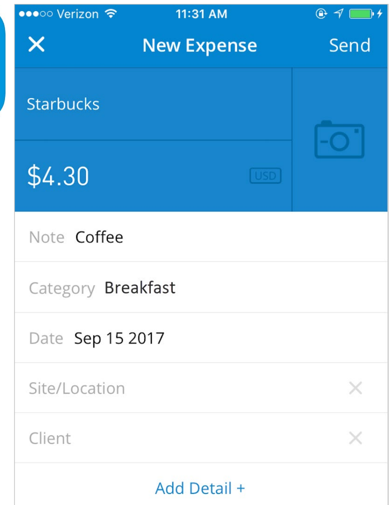
      Next, tap **Yes** to Allow Notification and you are ready to submit expenses. Also, if prompted, enable camera feature with Emburse Spend mobile app.

SUBMIT EXPENSE FOR REIMBURSEMENT

OPTION 1: OPEN THE EMBURSE SPEND APP – ON YOUR DESKTOP COMPUTER

1. From Dashboard, click **+ NEW REIMBURSABLE EXPENSE** icon at top right
2. Enter **Amount**, **Merchant**, and **Category**. Update **Date**, if needed.
   - If Amount is $50 or more, add receipt image. Upload receipt image from your computer, OR from **Receipts** in Emburse Spend. (If you have a receipt in your email, forward it to receipts@spend.emburse.com and it will be converted to a PDF file and saved in your Emburse Spend 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 **Create** to submit. Repeat steps for additional expenses.

OPTION 2: OPEN THE EMBURSE SPEND MOBILE APP – ON YOUR MOBILE PHONE



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 $50 or more, 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 **Send** to submit. Repeat steps for additional expenses.

APPROVAL AND PAYMENT

- You will receive an email notification when the expense is submitted, approved, and awaiting payment.
- Your expenses must be fully approved daily to be paid in 7-10 business days.

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 Emburse Spend.

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**.

FREQUENTLY ASKED QUESTIONS

When should I attach a receipt?
You must attach a receipt when the expense is $50.00 or more. This is required. Note any expense over $25.00 will get a soft warning for a receipt.

After I submit my expenses, when are they approved?
Once you submit your expenses, they will route to your assigned manager to review and approve as soon as possible. This may be your HHMI contact, event coordinator or Science Operations Manager. Once they approve, HHMI Accounts Payable team will review and approve for payment. Expenses should be approved daily to be paid in 7-10 business days.

When are payments processed?
Payments are processed every Friday for all approved expenses.

What happens if I submit an expense with an incorrect amount?
Contact your assigned HHMI contact/manager to *Send Back* the expense for you to edit and resubmit, or they can edit the expense and correct the amount/coding before approval.

Can I split expenses in Emburse Spend?
Yes, add the receipt to the expense in Emburse Spend, then only enter your portion of the bill and explain the difference in the note section.

NEED ASSISTANCE?

1. On Emburse Spend desktop application, you can click the help icon ? to access Emburse Spend 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.