Emburse User Guide:
Reimburse a Candidate

Step 1: Obtain a Financial Manager's Approval

Email the financial manager requesting approval of the candidate's expenses.

Include the position number and title, Fund/Org for allocation, and each reimbursement item with its corresponding amount.

Attach the approval email to the Expense Report in Step 4.

Step 2: Select the Candidate's Emburse Profile

Select the candidate's Emburse profile. View the guide *Enter a PA/ER on Behalf of a Traveler* for assistance.

- Tip: If you do not see the candidate's Emburse account in your delegate list, then email the USI Chrome River Helpdesk (ChromeRiver.HelpDesk@usi.edu).

Step 3: Complete the Expense Report Header

Click **+Create** in the top right-hand corner of the Expense Report ribbon.

- Tip: Do **not** create a Pre-Approval, as it is not required for a candidate because they are not an employee.



Complete the Expense Report Header fields. Review the information entered and confirm it is correct; click **Save**.

Report Name
Enter CANDIDATE, the candidate's last name, home city and state, and trip start date.
- Example: CANDIDATE Eagle Bellevue WA 9/1/26 (Do **not** use punctuation)

Request Type
Select **Guest Travel**

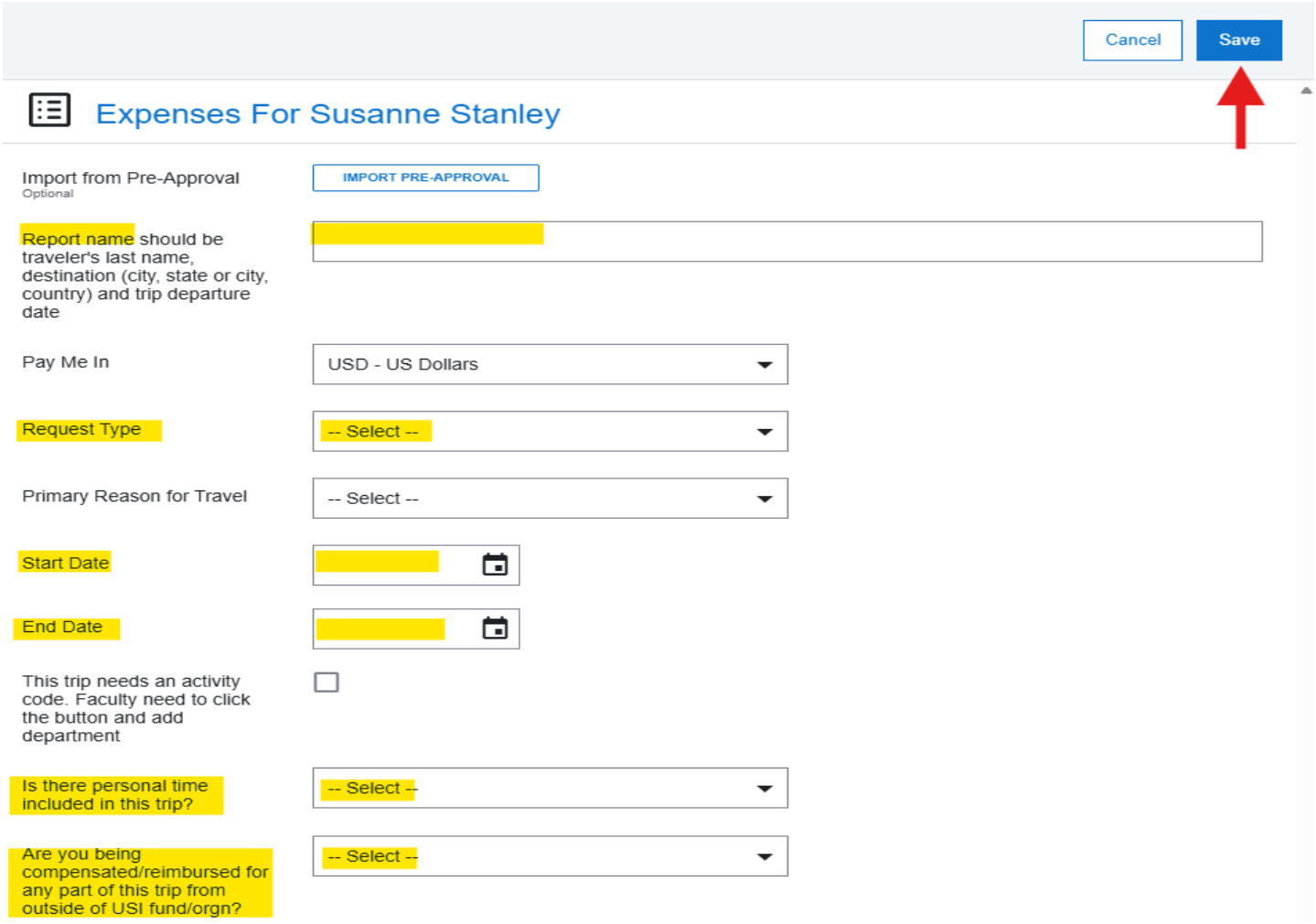
Travel Type
Select **Travel Candidates**

Start Date and End Date
Enter the dates from the candidate's arrival on campus through their return home.

This trip needs an activity code
N/A

Is there personal time included in this trip?
Select **Yes** or **No**. (If **Yes**, enter the personal travel dates in the field provided.)

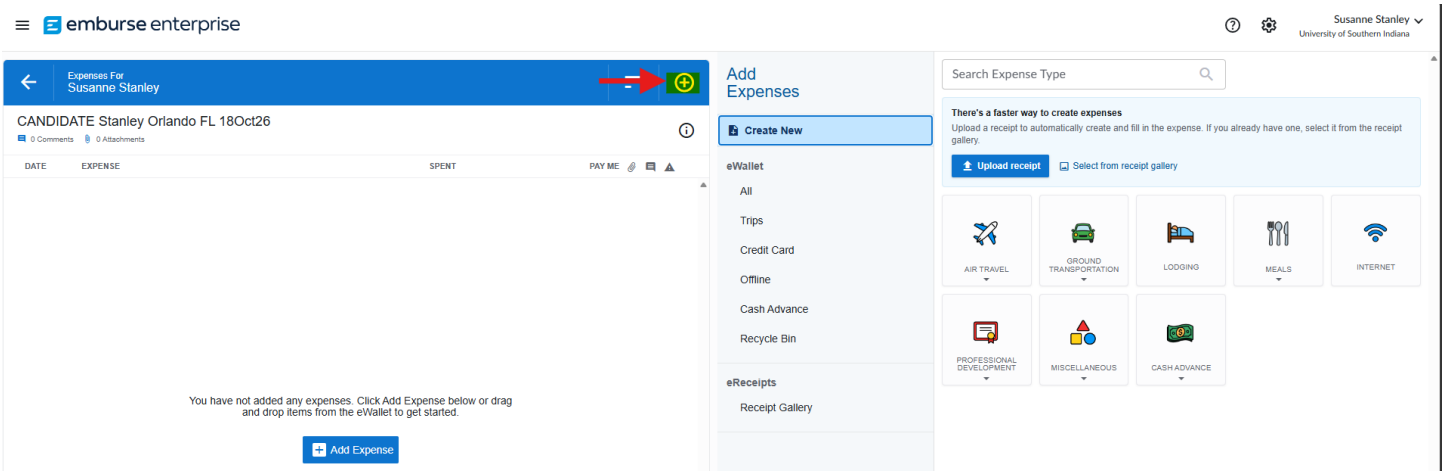
Are you being compensated/reimbursed for any part of this trip from outside of a USI fund/org?
Select **No**.



Step 4: Add Expenses and Upload the Financial Manager Approval Email

The Expense Report screen appears, with the **Add Expenses** menu opened on the right side of the screen

- Tip: If the Add Expenses menu is not visible, then click the circle with the plus sign to open it.



Select the appropriate tile for the expense.

- Tip: Tiles with a gray triangle contain additional options. Click the tile to view available selections.
- Tip: To delete an expense, select the expense line item, click **Delete**, and follow the prompts.

Complete all required fields, upload the receipt, review the information entered to ensure it is accurate, and then click **Save**. Repeat these steps for each expense being reimbursed to the candidate.

- Tip: If a warning or violation message appears, then follow the instructions provided. For additional guidance, refer to the guide *Policy Compliance Warnings and Violations for an Expense Report*.

Date
Enter the receipt date.

Spent
Enter the amount shown on the receipt. The amount must match the attached supporting documentation.

Business Purpose
Describe the business purpose and explain why the expense is reimbursable.

Allocation
Enter the Fund/Org that will be charged for the expense.

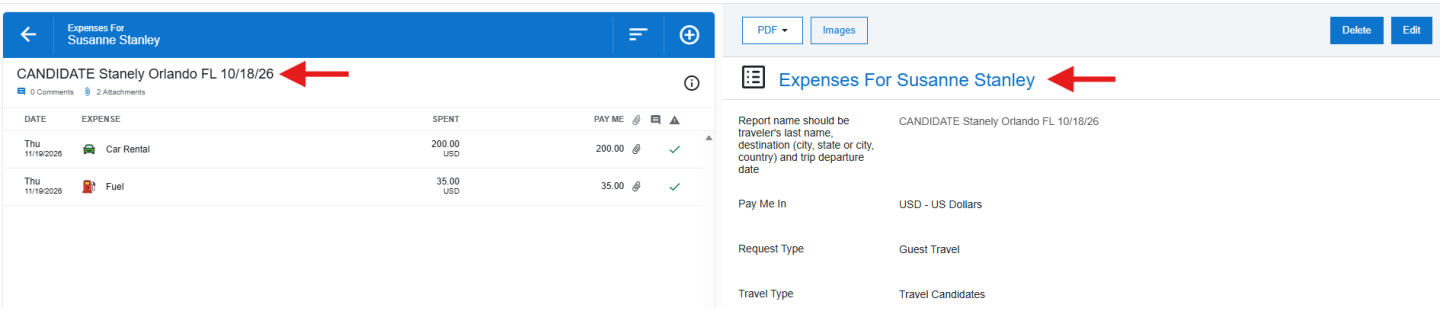
Attachments
Upload a receipt for each expense by selecting **Add Attachments** > **Upload Attachments** and choosing the receipt file (PDF or JPEG format). The receipt will appear in the **Attachments** section.

- Tip: To remove an attachment, click the file in the Attachments section. When the document opens, click the paperclip icon in the upper-left corner and delete it.

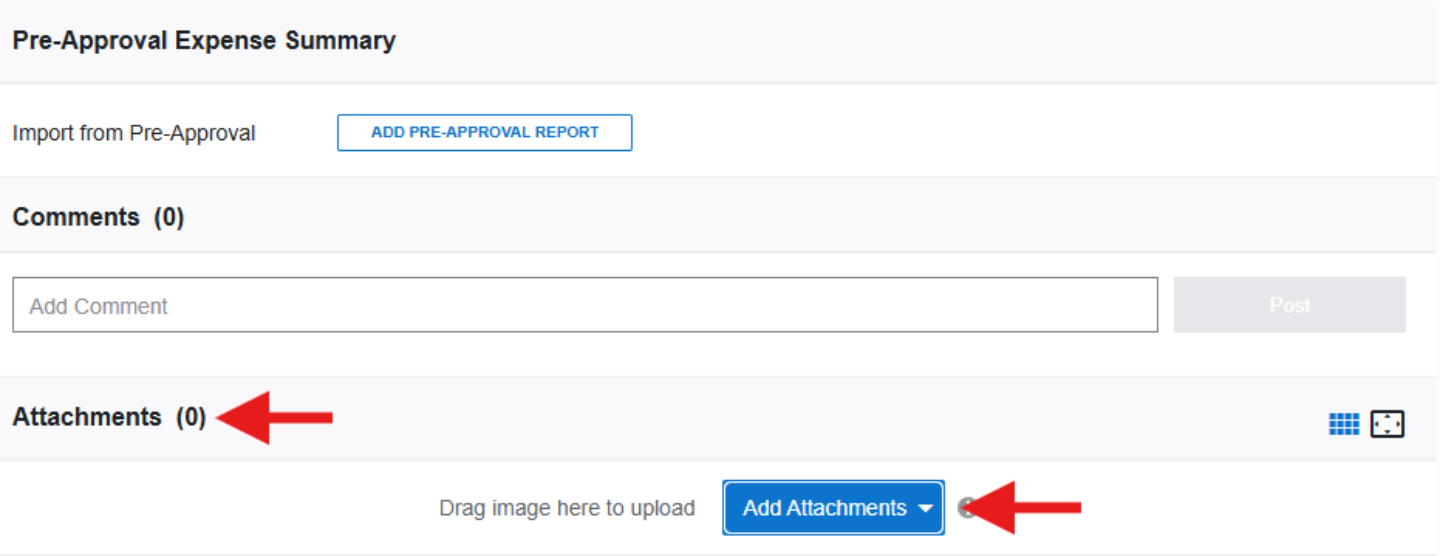
Upload the Financial Manager Approval Email

Upload the financial manager's approval email (PDF or JPEG format) to the Attachments section, located in the Expenses Summary on the right.

- Tip: If the Expense Summary is not visible, then click the report header under the blue ribbon on the left.

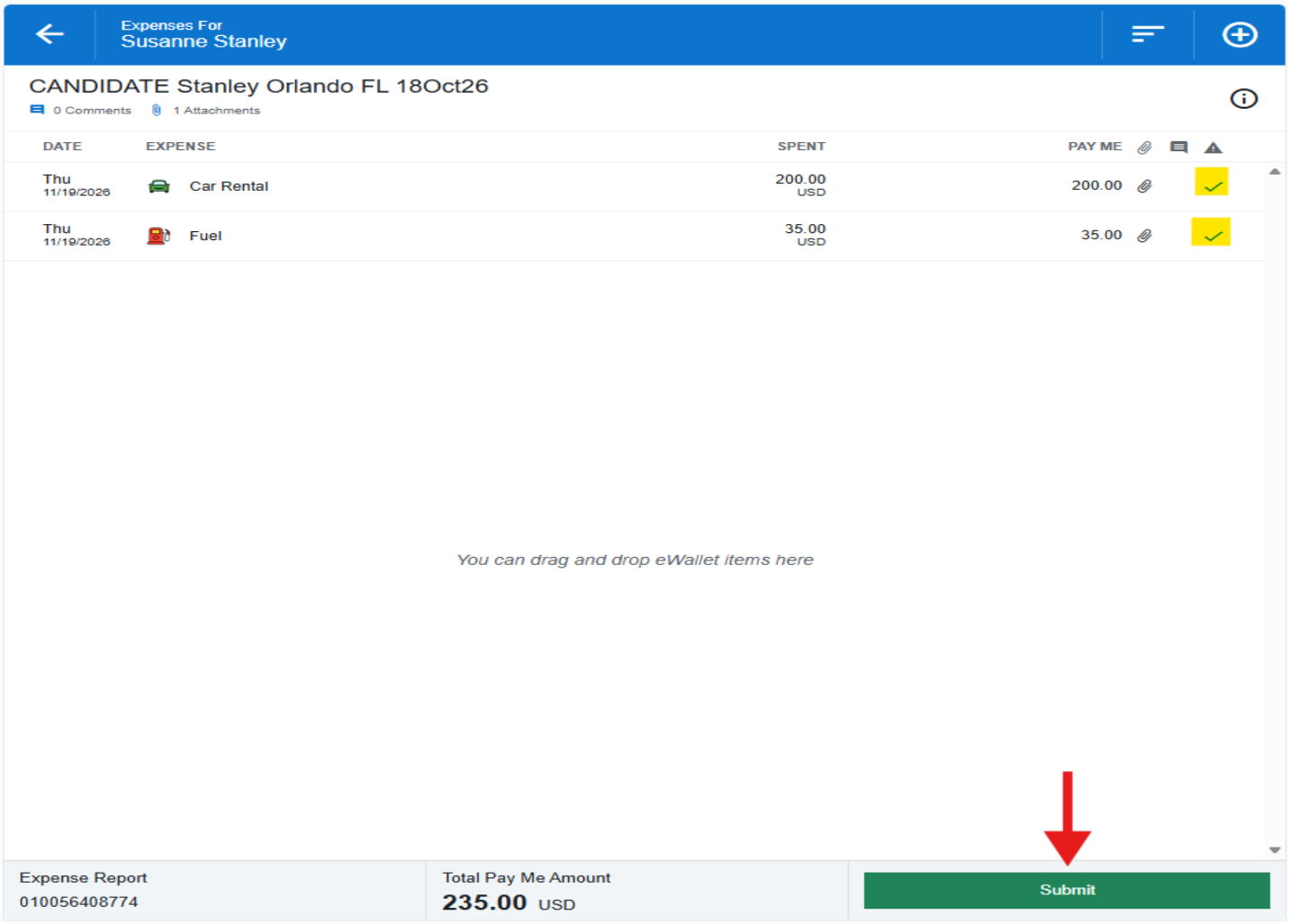


Scroll down to the **Attachments** section in the Expenses Summary. Click **Add Attachments** > **Upload Attachments** and upload the approval email (PDF or JPEG format).



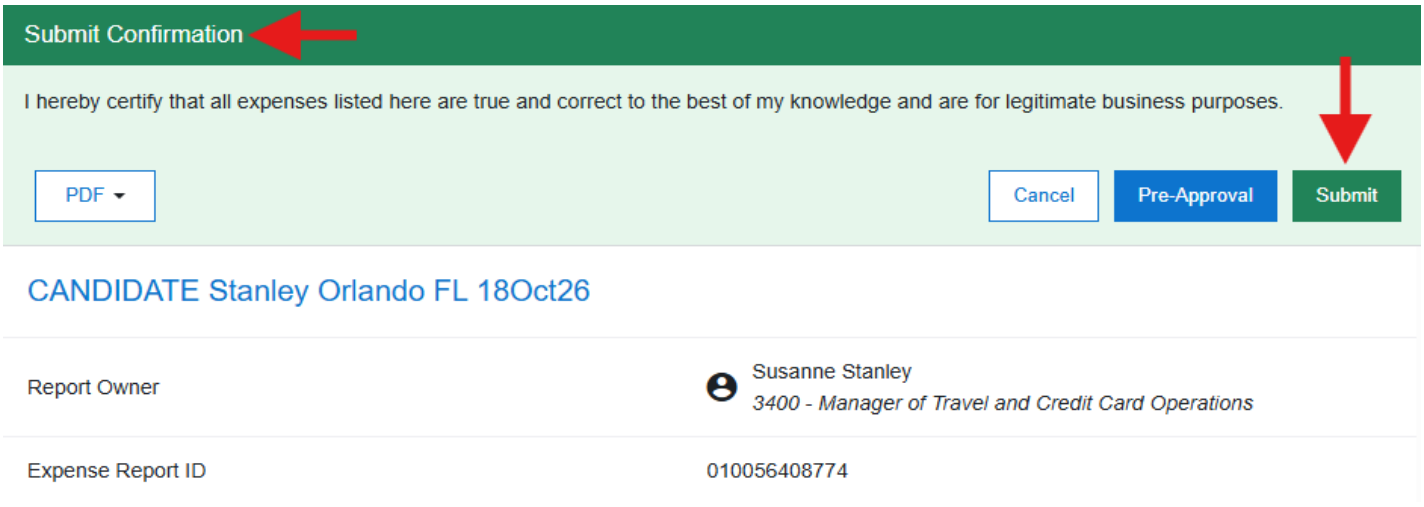
Step 5: Submit the Expense Report

Verify that all expenses display a green checkmark, then click **Submit** at the bottom of the Expense Items page.



The **Submit Confirmation** screen appears on the right.

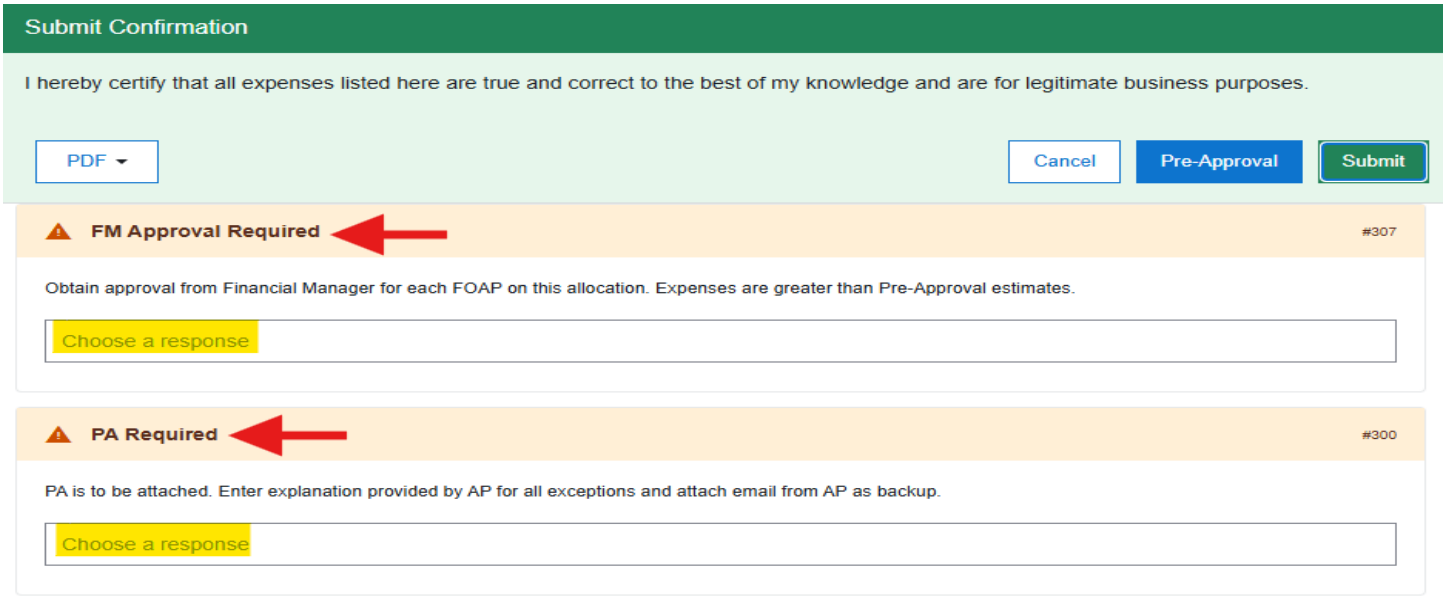
Review the information, then click **Submit** to complete the Expense Report submission.



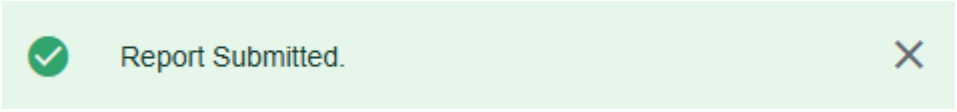
Important: Two warning messages will appear:

First Warning Box: FM Approval Required. In the **Comments** field, select: “Approval of Financial Manager(s) (for allocation used) is uploaded as an attachment.

Second Warning Box: PA Required. In the **Comments** field, select: "ER is for Candidate Reimbursement; Financial Manager approval is attached."



A confirmation message will briefly appear at the top of the screen after successful submission.



Important: The candidate will receive an email and will need to click **APPROVE** in the email to move the Expense Report to the Accounts Payable review queue for processing of their reimbursement.