

Memo: Updated Expense Reimbursement Process

From: Finance Operations **Date:** September 5, 2024 **To:** All Employees **Subject:** New Expense Submission System - Effective October 1

Summary

Starting October 1, 2024, we're moving expense reimbursement from Concur to Ramp. This memo outlines what's changing and what you need to do.

Why We're Changing

After evaluating several expense management solutions, we selected Ramp for:

- **Faster processing:** Reimbursements in 2-3 days vs. 5-7 days
- **Better mobile experience:** Easy receipt capture on your phone
- **Improved visibility:** Real-time expense tracking
- **Simplified approvals:** Streamlined workflow for managers
- **Virtual cards:** Instant virtual cards for online purchases

What's Changing

Aspect	Old (Concur)	New (Ramp)
Submission method	Desktop app	Mobile app + web
Receipt capture	Manual upload	Auto-scan from photo
Approval time	5-7 business days	2-3 business days
Reimbursement method	Payroll	Direct deposit (faster)
Virtual cards	Not available	Available
Category selection	Manual	AI-suggested

What's NOT Changing

- Expense policy limits remain the same
- Approval hierarchy unchanged
- Receipt requirements unchanged
- Travel pre-approval process unchanged

Action Required

By September 25

1. **Download the Ramp mobile app** (iOS/Android)
2. **Log in with your NovaTech SSO**
3. **Verify your bank account** for direct deposit reimbursements
4. **Complete the 10-minute training** (assigned in Workday Learning)

By September 30

- **Submit any pending expenses in Concur** (it will be disabled October 1)
- Pending Concur expenses will still be processed, but new submissions must use Ramp

October 1 onwards

- **Use Ramp for all new expenses**
- Concur will be read-only (view historical expenses only)

How to Use Ramp

Submitting an Expense

Mobile (Recommended): 1. Open Ramp app 2. Take photo of receipt 3. Ramp auto-fills details (verify and correct if needed) 4. Select category 5. Add business purpose 6. Submit

Web: 1. Go to ramp.com 2. Log in with NovaTech SSO 3. Click “New Expense” 4. Upload receipt and fill details 5. Submit

Getting Reimbursed

1. Submit expense with receipt
2. Manager approves (or it auto-approves under \$100)
3. Funds deposited to your bank account (2-3 business days)

Virtual Cards

For online purchases, request a virtual card: 1. Open Ramp app 2. Go to “Cards” > “Request Virtual Card” 3. Enter purpose and amount 4. Once approved, use the virtual card number 5. Receipt auto-attaches to the expense

Training

Live Training Sessions

- **September 18, 11am CT:** Ramp Overview (all employees)
- **September 22, 2pm CT:** Manager Approval Training
- **September 22, 3pm CT:** Ramp Overview (repeat session)

Calendar invites sent. Sessions recorded for async viewing.

Self-Paced Resources

- **Guide:** Notion > Finance > Expense Guide
- **Video tutorial:** Linked in Workday Learning
- **FAQ:** See below and in Notion

FAQ

Q: What happens to my Concur history? A: Historical data remains accessible in Concur (read-only) through December 2025.

Q: Do I need to re-enter my bank info? A: Yes, Ramp uses its own payment system. You'll verify your bank account during setup.

Q: What about corporate cards? A: If you have a NovaTech corporate card, it will be linked to your Ramp account. Transactions auto-import.

Q: Can I still submit paper receipts? A: Digital receipts are strongly preferred. If you only have paper, take a photo in the Ramp app.

Q: What if Ramp auto-categorizes incorrectly? A: You can edit any field before submitting. The AI learns from corrections.

Q: Are the expense limits changing? A: No. See the Travel & Expense Policy (FIN-TRV-001) for current limits.

Q: What if I have expenses from before October 1? A: Submit pre-October expenses in Concur by September 30. Late submissions can be made in Ramp.

Office Hours

Finance team available for questions: - **Slack:** #expense-help - **Email:** expense-help@novatech.com - **Drop-in hours:** September 23-27, 2-3pm CT (Zoom link in #expense-help)

Need Help?

- **App issues:** #it-help on Slack
 - **Policy questions:** #expense-help on Slack
 - **Training questions:** Reply to Workday Learning notification
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Contact

Finance Operations: finance-ops@novatech.com Expense Help: expense-help@novatech.com

Related: Travel Policy (FIN-TRV-001), Corporate Card Policy (FIN-CRD-001), Expense Policy (FIN-EXP-001)