

# Memo: Updated Expense Reimbursement Process

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

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## 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

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