

IEEE Expense Reporting and Reimbursement

With systems Council supplemental information and **COVID-related items**

V6a January 2023

The IEEE Systems Council (SysC) follows the published IEEE Expense Reimbursement Guidelines for Volunteers, dated August 26, 2022. The full document is available at [travel-expense-reimbursement-guidelines \(ieee.org\)](https://www.ieee.org/publications_standards/publications_standards_content.do?req=doc&context=IEEE_XP&docId=6242222)

The SysC expense reporting policy includes some highlights from the IEEE policy as noted below. Note that these are IEEE rules and are non-negotiable.

Airfares:

- Non-refundable Economy class is now standard for IEEE travel. Economy class is defined as the basic coach fare, which is the lowest fare offered by the airline. Basic economy class tickets that include an assigned seat are reimbursable.
- Upgrades such as extra leg room, priority boarding, Premium Economy, Economy Plus, etc. are no longer allowed, although certain exceptions can be made for medical conditions or similar, but only with prior approval of the Systems Council President.
- Fees associated with Covid testing are reimbursable.
- Travel insurance for trip cancellation or lost baggage is permitted. Travel insurance for medical coverage is not reimbursable. Hybrid travel insurance policies that include any type of medical coverage will not be reimbursed.
- The Tips/Gratuities section has been updated to reflect the current recommended gratuity allowance.

Car Rental:

Car rental is only permitted when alternative economic public transportation is unavailable or impractical.

Personal Vehicle:

Volunteers may utilize personal vehicles for business travel only when other transportation is unavailable or uneconomical.

- Mileage will be reimbursed at the current approved rate authorized by the United States Internal Revenue Service (IRS). See <https://www.irs.gov/tax-professionals/standard-mileage-rates> for the current reimbursable mileage rates. The mileage allowance covers all automobile costs including fuel, repairs/maintenance, insurance, etc.
- For international volunteers, the reimbursable rate will be based on the international currency equivalent.
- Mileage reimbursement cannot exceed the cost equivalent of traveling by air (economy class).
- Reimbursement for use of a personal automobile must include the date of each trip, a detailed business purpose, to/from locations, and number of miles driven for each segment

All expense reports will be submitted via IEEE NextGen concur except for the country exemptions shown in this section.

To access Concur, go to: <https://corporate.ieee.org/resources/travel-medical-and-insurance/ieee-expense-report> and click the Step 2 orange button on the right.

Your **normal IEEE network log-in** is used to access Concur.

Concur Profile

If you are a first-time user, you will be asked to fill out a [Concur profile](#) which will include certain preferences including how you wish to receive your reimbursement: the options are check by mail, direct deposit, or Western Union if you live in a country where IEEE cannot make a direct deposit. Your profile will also allow selection of the currency used.

In addition, if you do not already have an IEEE network log-in, there is a menu that when selected will allow you to do that.

Countries where direct reimbursement is permitted:

- United States, Canada, India
- Most European countries (with a few exceptions)
- Japan (with a few exceptions)

Countries restricting concur usage

Countries that **do not** allow expense report processing via concur are: Afghanistan, Aruba, Belarus, Burundi, Central African Republic, Congo, Cuba, Falkland Islands, Gibraltar, Iran, Iraq, Lebanon, Liberia, Libya, Moldova, Mongolia, Myanmar, Korea Democratic People's Republic of, Palestine, Sao Tome & Principe, Somalia, South Sudan, Saint Helena, Sudan, Syrian Arab Republic, Tajikistan, Turkmenistan, Ukraine, Venezuela, Yemen, and Zimbabwe. If the traveler resides in one of these countries, you must submit using the Excel spreadsheet method. Contact Treasurer Bob Rassa at bobrassa1@gmail.com for this spreadsheet and instructions.

Cost Accounts to charge your travel

There are four levels of cost accounts from which to select when filling out your travel expense reports:

- **Level 1** for SysC is *Technical Activities – Societies*
- **Level 2** is *Systems Council*
- **Level 3** will be one of the following, which the traveler will select based upon the purpose of your travel:
 - Awards
 - Board Meetings (for SysC officers members attending AdCm meetings)
 - Board Meeting Expenses (this is ONLY for organizational-level expenses such as refreshments etc.)
 - Distinguished Lecturer
 - CONVENE
 - Panel of Editors
 - President's Travel
 - Society Representatives (SysC authorized reps to conference boards)
 - Student Grants
 - Treasurer

NOTE that if you are a Systems Council elected or appointed officer attending a Systems Council AdCom meeting, use "Board Meetings" and NOT Board Meeting Expenses; this latter category is

for our SysC-level expenses such as meeting room rental, refreshments etc. Level 3 entries shown in grey are not to be used by the typical SysC officer traveler. If you are not an elected or appointed SysC officer, please submit your AdCom expenses through your home Society Concur system.

- **Level 4**

If Level 3 is “Board Meetings”, then select “ADCMX” for Level 4. If Level 3 is CONVENE, Panel of Editor’s Meetings, or Society Rep Meetings, then select “00000” for Level 4. If Level 3 is Distinguished Lecturer, then select “DISLR”. For the Society President’s travel other than to attend a Board meeting, use “XPRES”.

Note that we have found that Internet Explorer and possibly Edge may not fully support SAP concur, but Mozilla Firefox and Chrome do.

Reporting expenses

The web-based system allows you to itemize all expenses and upload your receipts. NOTE that on multiple-entry receipts such as hotels, IEEE previously required that each item must be separately itemized in Concur just as it shows on the hotel receipt- this is no longer required; all that is needed is to enter the total amount of the hotel receipt without itemization. If you have chosen to travel to a scheduled meeting a day or more before the actual meeting start or choose to stay later, simply identify the charges for such as “personal expense” and these will not be reimbursed. See the general IEEE rules for expense reimbursement in the **Clarifications and additional explanations** section following.

Receipts

Receipts are required for all expenses exceeding \$25.00 USD. All amounts should be in the currency of your residency – NextGen Concur will automatically convert all expenses in local currencies to your home currency.

Splitting Expenses

If you go on an approved trip and have two purposes, such as deliver a Distinguished Lecture and attend a Systems Council AdCom meeting, Travelers can split their expenses between multiple expense report purposes (ERPs) by choosing the allocate button which pops up on the bottom right-hand corner of the screen while you are creating their expense line.

The second option you can use to split their expenses would be to choose the itemize button which is also located in the bottom right-hand corner of the screen while you are creating their expense line.

Sample instructions for using the itemize button are as follows:

- Select the expense (line item) you want to split. Click the highlighted Itemize button
- Select the appropriate expense type.
- The total amount of the line item in this example is \$100. Enter the amount you want allocated to expense report purpose #1 (I entered \$65). Click Save.
- You will be asked to select the expense type again. You will also notice since \$65 was allocated to expense report purpose #1, the remaining balance of \$35 still needs to be allocated
- Enter the remaining balance of \$35 then select expense report purpose #2. Click Save.
- The line item is now split between multiple expense report purposes. \$65 to expense report purpose #1 and \$35 to expense report purpose #2.

Direct Deposit of your reimbursement:

The reimbursement currency in your Concur profile, you must select direct deposit as issuance of checks is no longer an option, is based on your country of residence. If you reside in a country where one of the currencies listed below is considered the local currency, you must enter your banking information directly into Concur (select Profile > Profile Settings > Bank information).

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)
- Singapore dollar (SGD)

If your currency is NOT one of the five listed above, you will need to complete a one-time enrollment with Western Union in order to receive electronic reimbursements from IEEE as check issuance is no longer available. To enroll, please complete the required registration form. Please enter your full 8-digit IEEE member number in the “Payee ID” field.

Expense Report Approvals

There are three levels of approval for IEEE expense reports: the Council Treasurer, the expense system operative at IEEE, and the TAB senior finance manager. There is also a semi-automated audit process that is part of the system. Each concur account holder can see the status of their expense reports, and that status will not change to “approved” until **all** levels of audit and approval have been completed. The Treasurer does not see the full status of expense reports, he/she only sees the status of expense reports in his/her queue for approval.

Travel Advances

IEEE no longer allows travel advances for official travel. Should a traveler on official, approved business need advance funds, these can only be obtained for major air travel and the process is to purchase your plane ticket and immediately submit the receipt for reimbursement. You do not have to wait for the trip to occur before you submit your major air travel. An estimated cost is not acceptable; the actual purchase receipt from the airline – not your credit card receipt - is needed.

Questions?

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Concur Training & Tutorial: <https://www.concurtraining.com/pr>

Concur Questions & Feedback: concurfeedback@ieee.org

Clarifications and additional explanations

1. Please Book flights well in advance, using round-trip basic economy non-refundable fares
2. Business class travel is never allowed for SysC as we never budget for such; nor would we ever typically be allowed to
3. **Reimbursement for meeting attendance lodging is for night prior to meeting, and night of last day of meeting** if meeting ends too late for reasonable return flight on that day. IEEE does not necessarily expect travelers to book their return flight the afternoon of our typical Saturday AdCom meetings if they end at noon, although I must provide a specific justification with my approval if the return is a subsequent day.
4. **Note that the maximum allowable meal expenses in a given day is \$100.**
5. **IEEE does not reimburse for conference attendance**, even if traveler is an official rep to the conference. Being a conference rep means a rep to the conferences board and reimbursement will be made to attend an official conference board meeting but not the conference itself.

6. If private vehicle is used for travel in lieu of plane or train, mileage and other travel cost may not exceed the cost of lowest-cost airfare, although airport parking and mileage to/from airport may be used in the calculation of cost justification.
7. **All travel must be approved in advance** by the appropriate officer, in most cases the Society President, but the Vice-President, Education for such things as distinguished lecture travel, or the Treasurer. Exceptions to the prior approval requirement are the Society President and Council Treasurer.

Disruptive Weather

In the event that disruptive weather is forecast for your area or the area to which you expect to travel it is best to cancel your trip if you might be stranded. Airlines will provide a credit for the trip and charge a rebooking fee, and IEEE-SysC would rather pay the rebooking fee for a future trip than substantial additional cost for you to stay additional days at your destination because of canceled flights.

New Rule on Expense Report Timeliness

The IEEE Board has ruled that all expense reports are to be submitted within 60 days of completion of travel, otherwise the expenses may not be reimbursed. I have not seen this enforced, but kindly try to submit your expense reports in a timely manner