

IEEE CIRCUITS AND SYSTEMS SOCIETY

TRAVEL AUTHORIZATION AND REIMBURSEMENT POLICIES

These guidelines are intended to establish the travel policies and to assist IEEE CASS volunteers with the proper procedures for requesting travel advances and filing of an expense report in order to avoid unnecessary delays in the reimbursement of expenditures.

Note that it is the policy of the Society to reimburse meals and lodging for the night before and the night after the approved meeting(s). Airfare is reimbursed at the most economical fares available – non-refundable, economy class, coach fare tickets. Business class airfare is not approved. All travelers are encouraged to book their tickets early in order to obtain less expensive airfares.

Effective 1 June 2019, all CAS volunteers are strongly encouraged to submit their completed expense request via SAP Concur within 1 month after the last day of the event. Please notice that, in any case, travel reimbursements for a specific event must be submitted maximum 3 months after the last day of the event.

1. APPROVED TRAVEL

- Board of Governors Members to the two annual Board of Governors Meetings
- Executive Committee Members to the three annual Executive Committee Meetings and the two Board of Governors Meetings
- The President and President-Elect to appropriate TAB meetings
- The Society Vice-Presidents:
 - VP – Financial Activities – IEEE Treasurer’s Workshop
 - VP – Conferences – IEEE CONVENE
 - VP – Publications – IEEE Panel of Editors Meeting and PRAC Reviews of majority-sponsored CASS Journals
- Editors-in-Chief to their annual board meetings at ISCAS and to the IEEE Panel of Editors Meeting. Also, to the PRAC Review for the journal of which they are EiC.
- Council Appointees to their relevant Council AdCom/BoG Meetings

1.1 DLP TRAVEL: Travel by the distinguished lecturers must be pre-approved by the Distinguished Lecturer Program Chair and is reimbursed for expenses between the traveler’s home and the destination city. Travel reimbursement is generally limited to \$1500 USD for travel within the lecturer’s home continent and \$2000 USD for travel to another continent. Funds for the program are limited, and speakers are encouraged to couple travel with other meetings or multiple speaking engagements.

1.2 OTHER TRAVEL: Requests for reimbursement by the Society for all other travel must be pre-approved by the Society President and VP – Financial Activities prior to the travel.

2. TRAVEL ADVANCES AND REIMBURSEMENTS

The traveler may submit only one expense report for each trip. Should a future credit card billing to an individual result in a loss to the individual based on the exchange rate determined by the credit card company, a request for additional reimbursement should be submitted, including a copy of the original reimbursement request and a copy of the credit card billing showing the actual billed amount.

2.1 ADMISSIBLE EXPENSES

IEEE policy provides for reimbursement for those individuals authorized to attend specific meetings only. The specific meeting authorized to attend, or the purpose of the travel must be indicated for each day. In instances where an individual will have a reasonable separation between meetings and it is not economical or possible to depart and return later in the week, expenses for meals and lodging actually incurred will be reimbursed. It is the policy of the Society to reimburse meals and lodging for the night before and the night after the approved meeting(s).

Transportation Reimbursement

Tolls and Parking	Reasonable expenses are reimbursed for costs incurred for tolls or parking with the use of personal or rented automobiles while on authorized Society travel.
Mileage (if you use your personal automobile)	The IEEE approved rate of reimbursement will be used for the actual mileage incurred while on Society authorized travel. The number of miles/kilometers driven must be recorded and documented with an image of a map showing mileage. This rate is computed within SAP Concur.
Taxi-Bus	Details of each taxi fare must be itemized on your Concur report. A receipt is required for all taxi, bus or airport shuttle expenses.
Air Travel	Airfare is reimbursed when it is the most economical form of transportation. The most economical airfare should be used, meaning that non-refundable economy/coach fare tickets should be purchased. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.) You can find more information about air travel below*
Train Travel	Rail travel should be at economy/coach rate. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.)
Auto Rental	Car rentals should only be undertaken when alternate economic public transportation is unavailable or impractical. (Public transportation includes taxis, buses or airport limousines.) Individuals are reminded to use the IEEE identification number to obtain proper discounts. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.) You can find more information about car rentals below. **

* Air travel is limited to reimbursement for the lesser of actual fare incurred or tourist, shuttle, coach or other economy accommodation. For travel by other means (e.g., train or rental car), reimbursement will be the actual cost unless that cost exceeds the comparable airline fare in which case the Society will reimburse only the comparable airline fare. The Society does not reimburse for business class fares, unless previously approved. The most economical airfare should be used. Therefore, all persons traveling on Society business shall be required to book non-refundable, economy class, coach fare tickets when possible. The Society assumes you will select the lowest possible fare, regardless of carrier. Alternate airports should be considered when the one-way saving is \$100.00 USD or greater. Any persons seeking to book higher-grade seats on economy flights, or full coach fares, must have pre-approval by the President and VP – Financial Activities. Exceptions to this policy are extremely rare but may be allowed for health reasons. Pre-approval by the Society President and VP – Financial Activities shall be required for any exception.

** Car rentals should only be undertaken when alternate economic public transportation is unavailable or impractical. (Public transportation includes taxis, buses or airport limousines.) Individuals are reminded to use the IEEE identification number to obtain proper discounts. IEEE Corporate ID Numbers can be found online [here](#). IEEE's corporate automobile liability insurance policy is extended to include collision and liability coverage on a primary basis for automobiles rented for authorized IEEE business trips. Therefore, when renting automobiles, individuals are advised to not purchase the collision damage waiver/loss damage waiver

(CDW/LDW) offered at the time of rental. Some states may require proof of collision/liability insurance coverage. If that is the case, individuals are requested to contact the IEEE Insurance Department to obtain proof of insurance coverage.

Lodging and Meals Reimbursement

Lodging	The Society will reimburse single room rates, including taxes and fees. The expense must be recorded daily. The original itemized hotel bill must be attached to the expense report as a receipt. Reimbursement is limited to meeting days, one day before the meeting, and one day after the meeting. Pre-approval for any extended stays must be obtained from the VP – Financial Activities.
Meals	Details for each personal meal expenditure must be itemized on the expense report form showing the date and the amount. When dining in the hotel where you are staying, it is recommended that you charge your meals to your room to reduce the need for additional receipts.
Official Guest	Details for each courtesy or entertainment expenditure must be itemized showing the date, amount, name of guest, affiliation and purpose of the expenditure. Total daily amounts are automatically recorded on the expense report form. This section is only to be used for your guest's meals. Your own portion of the cost should be reported under meals/self.
Telephone, Fax, Internet	Telephone, fax, and internet reimbursements are limited to IEEE related business. Calls placed from home telephones or cell phones must have copies of itemized telephone bills attached to be eligible for this reimbursement.
Tips and Gratuities	Reasonable tips and gratuities will be reimbursed. Itemize the tips in the description with a total in the space provided. Use an additional page if required. Tips over \$25.00 per day must have a receipt.

* Reasonable food and beverage expense will be reimbursed. Volunteer and staff individual daily meal and beverage expenses are limited to US\$100 (this is the upper limit, please try to be significantly below this limit if possible). This is not to be interpreted as a per diem amount; receipts are required for expenditures over US\$25.00. Expenses beyond these values require a written explanation on the traveler's expense report.

Other – Any expenses not yet recorded on the expense report will be reported as an “other” expense. Examples might be reasonable and necessary laundry and valet charges, which will be reimbursed after travel of five or more consecutive days if the original receipts are attached. Non-essential expenditures for personal items such as newspapers, movies and entertainment, or any other unnecessary non-travel related items will not be reimbursed.

3. PREPARING AND SUBMITTING THE CONCUR EXPENSE REPORT

3.1 COMPLETING THE SAP CONCUR EXPENSE REPORT FORM: All expense reports will be submitted via IEEE Concur. To go to Concur, please visit <https://www.concursolutions.com/home.asp>, or <https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report>. You will be asked to fill out a profile which will include 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.

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 us is *Technical Activities - Societies*

Level 2 is *Circuits & Systems Society*

Level 3 will be one of the following, which the traveler will select based upon the purpose of your travel:

- BoG Meeting
- BoG Member Pre-Approved Travel (non-BoG Meeting travel)
- CAS-M EiC Meeting
- Council Appointee Related Meeting
- DL Visit
- ExCom Meeting
- JETCAS EiC Meeting
- Outreach
- Past President Travel
- President-Elect Travel
- TBioCAS EiC Meeting
- TCAS-II EiC Meeting
- TCSVT EiC Meeting
- VP Conferences Travel
- VP Financial Activities Travel
- VP Publications Travel
- VP RAM Travel

Level 4 should not offer a choice.

The reimbursement currency in your Concur profile, should you select a direct deposit, 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. To enroll, please complete the required registration form. Please enter your 8-digit IEEE member number in the "Payee ID" field.

Concur Training & Tutorial is available at <https://www.concurtraining.com/pr>, Concur Questions & Feedback should be sent to concurfeedback@ieee.org with copy to Brittan Parkinson, manager@ieee-cas.org.

3.2 RECEIPTS: Copies of the receipts must be attached to your SAP Concur report. Receipts for any single expenditure in excess of \$25.00 must be provided, and IEEE encourages that all receipts for any amount be submitted.

3.3 APPROVAL AND SUBMISSION OF EXPENSE REPORTS: An electronic copy of the expense report must be completed via SAP Concur. Once the report is submitted it will be reviewed by the CASS Operations Manager and the VP – Financial Activities. Upon their approval, the report will be submitted to IEEE for final review and reimbursement.

3.4 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.