FINANCIAL PROCESS FOR SECTIONS CONGRESS (ADJUSTED FOR R8)

August 11-13, 2023

I. INTRODUCTION:
This document has been prepared to assist you with the registration and reimbursement process as it pertains to Sections Congress ONLY. Prior to registering for Sections Congress, all volunteers should understand what their personal financial responsibilities are to attend and what the requirements are in order to be reimbursed. All request for reimbursement MUST go through the Concur platform. Information on processing items in Concur is contained in this document.

II. REGISTRATION:
If you are a delegate or volunteer being reimbursed by MGA, please reach out to your Region Coordinators in advance to receive the appropriate codes to register.

If you are being reimbursed by the Region or Section, you will need to register with a credit card and request reimbursement through the Concur platform. There is no code for this type of registration. The same approach would be used for an Exhibit Booth.

III. EXPENSE REPORTS:
Expense reports can be completed for registration and airfare upon completion of booking. There is no need to wait until after the conference to be reimbursed for these items. We strongly encourage you to process request for reimbursement in a reasonable timeframe prior to attending the event.

The following is a list of reimbursable expenses for Sections Congress. Please refer to the instructions for Concur and the IEEE travel policy for expense guidelines included at the end of this document.

- Registration Fee = $400
- Airfare
- Ground Transportation
- Hotel (3 nights)
- Daily Meal reimbursement - Including 2 dinner meals

Note: Additional hotel nights and related expenses will be charged to the appropriate areas and NOT to Sections Congress.

IV. FAQ’s:
Question: Can I submit more than 1 expense report?

Answer: Yes, as mentioned above, we strongly encourage that you submit an expense report for reimbursement for registration and airfare incurred PRIOR to July 1. Expenses incurred AFTER July 1 should be included on a single report that will be submitted upon conclusion of Sections Congress.

Question: What happens if I have registered for the event and received reimbursement but can no longer attend?

Answer: Registration is transferable to another delegate.

Question: What if airfare has also been booked and reimbursed? Does this transfer to the person attending in my place?

Answer: Airfare booked with travel insurance will be reimbursed directly to the traveler. The traveler is then responsible to reimburse IEEE for the amount received from airline. Refer to volunteer guidelines regarding reimbursement for travel insurance.

Question: I am a Region Coordinator for an affinity group. My expenses are covered 50% by MGA and 50% by my Region, what do I need to do in Concur?
Answer: You will need to allocate each itemized expense in Concur and allocate 50% of that cost to the ERP Level 4 for Sections Congress and the other 50% is paid by your Region or Section and coded as per the screenshot on page 4 below.

Question: I will be staying an extra night to attend separate meetings held for my group. How do I handle these expenses in Concur? Do I need to submit a separate expense report?

Answer: No. You are covered for 3 nights for Sections Congress. The additional night should be coded to your appropriate Region or Section using the itemization tab in your expense report.

Question: Can I upgrade my airfare?

Answer: No. Only economy airfare is reimbursable for covered delegates. You can upgrade by using personal miles, points, etc.

V. PROCESSING OF EXPENSE REIMBURSEMENT VIA CONCUR:

-All volunteers requesting reimbursement will need to submit an expense report through Concur. You must have an IEEE account and an IEEE Concur account to use the Concur platform.

-Request for an IEEE account can be made here: https://www.ieee.org/about/help/my-account/web-account.html

-Volunteers will also need to create your expense reimbursement account for the funds to be transferred to your bank. Please refer to the following link: https://www.ieee.org/expense It takes 24-36 hours for your Concur account to be activated

-Volunteers will be notified via email once your account has been activated. To log into the account after activation, please go to ieee.org/expense and click the orange button to access your account. Due to single sign on, you will not be required to enter a username or password.
1) Reimbursement to the Volunteer from the Region 8

Screenshot for volunteers who are not being reimbursed by MGA however the REGION is paying for their expenses. Below is an example of an Expense Report. Level 1 (in column A) is the first level that Regions and Sections should select. Level 2 is the location of the Geo Unit, and Level 3 is the actual Geo Unit. This also includes the WBS Task that the Geo Units should select in Level 4.

Level 1 – Regions
Level 2 – Eur. Mid. East Africa – Region 8
Level 4 – 113 Section Congress (9.01.113)

2) Reimbursement to the Volunteer from the Section

Screenshot for volunteers who are not being reimbursed by MGA however the SECTION is paying for their expenses. Same instructions as Region Reimbursement above with coding for Section information.

Level 1 - Sections
Level 2 - Western USA - Region 6
Level 3 - Alaska Section (R60005)
Level 4 – 000 Sections Congress (5.15.000)
3) Reimbursement to the Region Coordinators for YP, WIE and SAC covered at 50% by MGA and 50% by the Region 8

You will need to itemize EACH expense type. Enter your expense in the Details tab for the total amount. (i.e. airfare $1,000) click save expense.
Then click on the **Itemizations** tab and select create itemizations.

Type in half of the amount to be charged to the Region 8 (i.e. $500) and hit **save itemization**.

Click Create Itemization again to charge the remaining 50% to MGA, then hit **save**. Your remaining dollars must be $0.00.

Charge remaining 50% to:
Level 1 – Member & Geographic Activity
Level 2 – Sections Congress
Level 3 – N/A
Level 4 – SC000
4) Reimbursement to the Primary Section Delegates, MGA Board Members, Section Congress Committee and Region Coordinators, MGA Vice Chairs & Elects and Region Director Elects, Chairs for YP, WIE and SAC covered at 100% would code their expense reports as follows:

Level 1 – Member & Geographic Activity
Level 2 – Sections Congress
Level 3 – N/A
Level 4 – SC000

If you have additional questions, please reach out to sc-information@ieee.org