

# **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 to 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.

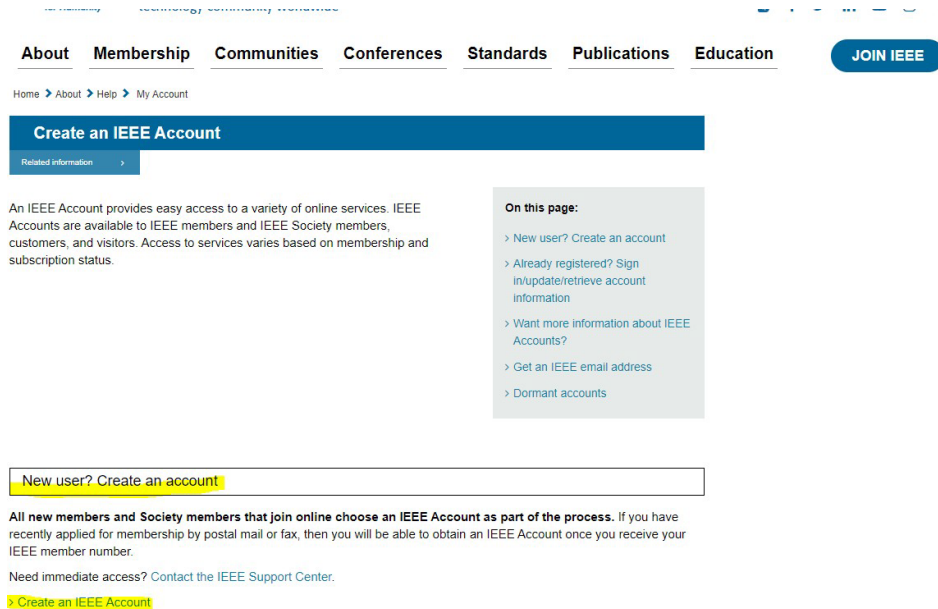
**Question:** Can I upgrade my airfare?

**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.

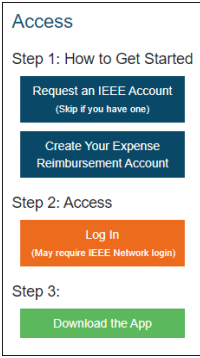
-Request for an IEEE account can be made here: <https://www.ieee.org/about/help/my-account/web-account.html>



The screenshot shows the IEEE website's 'Create an IEEE Account' page. At the top, there is a navigation menu with links for 'About', 'Membership', 'Communities', 'Conferences', 'Standards', 'Publications', and 'Education', along with a 'JOIN IEEE' button. Below the navigation, the page title is 'Create an IEEE Account'. The main content area includes a section titled 'An IEEE Account provides easy access to a variety of online services. IEEE Accounts are available to IEEE members and IEEE Society members, customers, and visitors. Access to services varies based on membership and subscription status.' To the right of this text is a 'On this page:' sidebar with links: '> New user? Create an account', '> Already registered? Sign in/update/retrieve account information', '> Want more information about IEEE Accounts?', '> Get an IEEE email address', and '> Dormant accounts'. At the bottom of the page, there is a highlighted link: '> New user? Create an account'. Below this link, there is a paragraph: 'All new members and Society members that join online choose an IEEE Account as part of the process. If you have recently applied for membership by postal mail or fax, then you will be able to obtain an IEEE Account once you receive your IEEE member number.' and a link: 'Need immediate access? Contact the IEEE Support Center.' followed by another highlighted link: '> Create an IEEE Account'.

-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

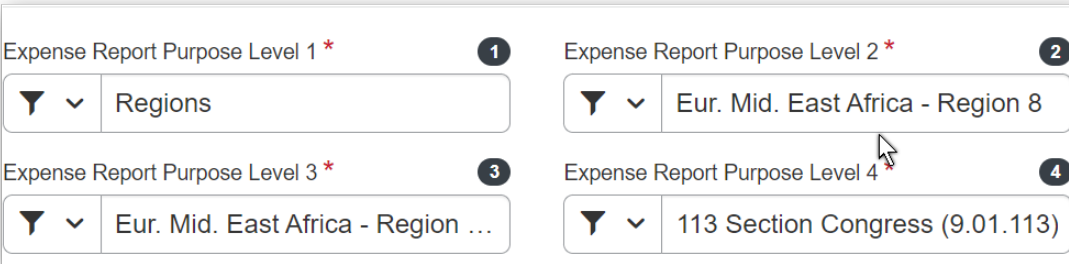
-Volunteers will be notified via email once your account has been activated. To log into the account after activation, please go to [ieee.org/expense](https://www.ieee.org/expense) and click the orange button to access your account. Due to single sign on, you will not be required to enter a username 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 3 – 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)

Previous Comment

Entered By [REDACTED]

Report Name Alaska Planning & ExCom 2023-01-	Report Key 66037	Employee Name [REDACTED]	Report Date 02/01/2023
Receipts Received Yes	Submit Date 02/01/2023	Payment Status Not Paid	Comment
Expense Report Purpose Level 1 Sections	Expense Report Purpose Level 2 Western USA - Region 6	Expense Report Purpose Level 3 Alaska Section (R60005)	Expense Report Purpose Level 4 <del>000 Meetings (4,10,000)</del> 000 Sections Congress (5.15.000)

Save Cancel

### 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.

Airfare \$1,000.00

Details Itemizations

Allocate

Expense Type \*  
Airfare

Transaction Date \*  
MM/DD/YYYY

Ticket Number

From Airport \*  
Search by Code

To Airport \*  
Search by Code

From Date \*  
MM/DD/YYYY

To Date \*  
MM/DD/YYYY

Vendor \*  
Search for Vendor

Airline Travel Service Code \*  
None Selected

City of Purchase

Payment Type \*  
Out of Pocket

Amount \*  
1,000.00

Currency \*  
US, Dollar

For illustration only. All fields must be completed.

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:**

Expense Report Purpose Level 1 * 1	Expense Report Purpose Level 2 * 2
Member & Geo. Activities (M...	Sections Congress
Expense Report Purpose Level 3 * 3	Expense Report Purpose Level 4 * 4
N/A	SC000

- 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](mailto:sc-information@ieee.org)**