Policies and Procedures

The following policies and procedures apply to volunteers who have been pre-authorized by IEEE-SA staff to seek reimbursement from IEEE for specific IEEE-SA business-related travel. Volunteer travel plans must be reviewed and authorized by the appropriate IEEE-SA staff prior to making travel arrangements. Failure to do so will likely result in IEEE-SA denying reimbursement for expenses. These guidelines intend to establish parameters for compliance by volunteers so that timely reimbursement of expenses can occur.

It is IEEE policy to provide for, or reimburse, reasonable authorized travel expenses incurred in connection with the conduct of IEEE business. All persons traveling on IEEE business for whom IEEE pays or reimburses transportation expenses shall travel economically by booking economy class flights well in advance and shopping for low-cost business class train fares and low-cost rental car rates. Guidelines and procedures for reimbursement, required receipts and related limitations, beyond those described in this policy, shall be specified in the IEEE Finance Operations Manual. IEEE does not reimburse for the travel expenses of spouses or travel companions...

(From IEEE FOM V.43 Section: 6)

This IEEE-SA Guidelines document is based upon IEEE travel reimbursement guidelines, but expands upon those guidelines in certain areas. When the IEEE-SA Guidelines do not address a particular topic, the IEEE travel guidelines, IRS travel guidelines, and/or the judgment of the appropriate IEEE-SA staff shall prevail.

IEEE-SA requires receipts for **ALL** expenses, regardless of value.

If an entity other than the volunteer is to be reimbursed for the travel expenses of the volunteer [e.g., the volunteer’s employer or the volunteer’s consulting firm], then additional documentation is required and should be coordinated with IEEE-SA staff prior to submission of the expense report. Failure to do so will result in delayed reimbursement of expenses.

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1 If you are unsure who your staff contact is, please notify the Director, IEEE-SA Governance d.ringle@ieee.org

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**Consensus**

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**Additional Resources**

IEEE Expense Report
http://ieeesa.io/Expense-Report

W-8 NON-U.S.
http://ieeesa.io/w8

W-9 U.S. Form
http://ieeesa.io/w9

Business Auto Liability and Physical Damage Insurance
http://ieeesa.io/insurance

FOM.6 - Business Expense Reporting
http://ieeesa.io/FOM
Airfare
All persons traveling on IEEE-SA business who are seeking reimbursement for airfare or for which airfare is provided for them by IEEE, shall book only the most economical airfare, i.e., non-refundable, economy-class, coach-fare tickets; provided, however, the reimbursement or purchase by IEEE of business class fares shall be permitted only (i) when the flying time is over eight consecutive hours for a single segment or over eight hours flying time where a layover is required, (ii) when it is budgeted by the organization unit, and (iii) with prior permission of the appropriate IEEE-SA staff and prior completion of the request within the Business Travel Upgrade system. Individuals are encouraged to purchase upgradeable coach class fares and use miles or coupons to upgrade to business class.

Hotel Reimbursement
Volunteers attending IEEE or IEEE-SA meetings must charge their reimbursable room nights as follows:

- **IEEE BOD meeting series**: shall be charged directly to the IEEE master bill. (The "master bill" is one consolidated bill from the hotel to IEEE for all of the room nights used by attendees at the meeting). Prior to booking, please discuss with the appropriate IEEE-SA staff how many nights you plan to stay. If you plan to lodge outside of the IEEE-contracted venue(s), you must obtain approval from the appropriate IEEE-SA staff prior to booking; otherwise you will not be reimbursed.

- **Any other meeting**: will be reimbursed as directed by the appropriate IEEE-SA staff. Please discuss your travel plans, including how many nights you plan to stay, prior to booking. If you plan to lodge outside of the IEEE-contracted venue(s), you must obtain approval from the appropriate IEEE-SA staff prior to booking; otherwise you will not be reimbursed.

When authorized, standard single room occupancy will be reimbursed, limited to the night of and/or the night prior to the meeting. It is permissible to stay an additional night in order to obtain a less expensive airfare that fully offsets the additional lodging and food/beverage costs. Upgrades to suites or executive floor/business-class rooms will not be reimbursed by IEEE; an upgrade may occur only at no additional cost to IEEE (e.g., via the use of personal reward points).

Car Rentals, Mileage Reimbursement, Auto Insurance, Tolls, Parking, and Ground Transportation
Car rentals should only be undertaken when economical public transportation is unavailable or impractical. For example, the use of hotel courtesy transportation is encouraged.

Midsize or smaller cars should be rented unless three or more people are sharing a car or sizable equipment is being transported. Refuel rental cars prior to returning. Optional services should be declined. When traveling within the United States, IEEE Business Automobile Liability Insurance (Collision/Comprehensive Liability) is primary on rented automobiles, and coverage purchased through the rental car company is not necessary and will not be reimbursed by IEEE. When traveling outside the United States, local compulsory coverage shall be purchased from the rental car company.

IEEE will reimburse personal car mileage at the current approved rate authorized by the U.S. Internal Revenue Service. Only one person in a private vehicle may make a claim for reimbursement. IEEE volunteers should maintain automobile insurance as required by local law. Within the United States, IEEE Business Automobile Liability Insurance is in excess of one’s personal automobile liability insurance and only becomes available once the individual’s personal liability insurance coverage limits are exhausted. Outside the United States, the volunteer is responsible for any/all incidents resulting in a loss and therefore should maintain adequate auto liability and physical damage insurance coverage limits.

Tolls, parking, and necessary ground transportation will be reimbursed.

Food & Beverage
Reasonable personal food and beverage expenses will be reimbursed. Volunteer daily meal and beverage expenses are limited to a maximum of $100. [Reimbursement will not occur for alcoholic beverages that are purchased outside of a meal at a restaurant.] This is not to be interpreted as a per diem amount; receipts are required for ALL expenditures. Daily food and beverage expenses over $100 require a written explanation, included as an additional attachment, on the traveler’s expense report and may not be reimbursed.

Miscellaneous Expenses
Reimbursement for any items not already addressed within these guidelines must be discussed with, and approved by, the appropriate IEEE-SA staff PRIOR to purchase of the product or service.

Reimbursement Process and Procedures
1. All necessary approvals shall be obtained from appropriate IEEE-SA staff prior to booking travel.

2. Register with the IEEE Concur reimbursement system in order to submit your expense report for reimbursement. More information can be found here: https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report

3. Submit expense report through Concur to appropriate IEEE-SA staff within two weeks of completion of travel. Banking information must be provided to Concur for electronic reimbursement. If you reside in a country in which IEEE does not have a local bank account, then reimbursement will be made via Western Union. Details on how to enroll are located within the Concur system.

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2 IEEE-SA policy is to obtain approval from appropriate staff prior to booking, as not all flights will be covered.

3 A request within the Business Travel Upgrade system shall be coordinated and completed by staff.

4 Mileage reimbursement, both within and outside of the United States, will be reimbursed at the current U.S. Internal Revenue Service rate.