Dear Honorable AdCom members:

This is your treasurer, Olek, writing to remind you about the travel reimbursement procedure.

Remember that the **Finance Committee increased the travel allowance for the voting AdCom** members and voting TC and Senior/Live representatives **to $3000 per year combined** for both AdCom trips. AdCom members with voting rights do not have to pre-approve travel as long as their annual expense stays within the aforesaid limit. If you were asked to register for the conference **as a non-author** for the conference, that expense does not count towards your allowance.

Please tell us which pool of money should be used to pay back your expenses so that IEEE does not have to look it up at each stage of expense approval. There are several types of voting AdCom representatives – Elected AdCom members, Senior and Live AdCom Representatives, Technical Committee Cluster Delegates to name a few. Incorporate that information into the report name. **Choose the correct cost center (four levels of expense purpose)**. See examples below:

- Elected AdCom Members with voting rights,
- Elected Cluster Representatives with voting rights,
- Elected Senior & Life AdCom Representatives with voting rights
- President pre-approved IES volunteers (pre-approved form on IES website)

SAP Concur | Travel | Expense | Approvals | App Center

Manage Expenses   View Transactions

Create a New Expense Report
Report Header

Report Name	Report Date	Comment
AdCom2/2022 Elected AdCom Mem	08/15/2022	2022-10 Elected AdCom Member Travel

Expense Report Purpose Level 1	Expense Report Purpose Level 2	Expense Report Purpose Level 3	Expense Report Purpose Level 4
1 Technical Activities Societies	2 Industrial Electronic Society	3 AdCom - AdCom Travel	4 ADCMX

- IES Officers

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Create a New Expense Report
Report Header

Report Name	Report Date	Comment
AdCom2/2022 XYY TC Repr.	08/15/2022	2022-10 XYZ Cluster Representative Travel

Expense Report Purpose Level 1	Expense Report Purpose Level 2	Expense Report Purpose Level 3	Expense Report Purpose Level 4
1 Technical Activities Societies	2 Industrial Electronic Society	3 AdCom - Officer Travel	4 EXCOM

The reimbursement timeline: your report goes to Mr. President, Mr. President Elect, or a corresponding VP depending on the purpose of the trip. Upon their approval, it goes to

me and then to Matt. All that typically takes one to two days. Then it goes to two more places in IEEE HQ which may take up to ten additional days. Then, if the expense is approved, it may take another up to five days to get the reimbursement.

In case of mistakes, the report returns to you, and the process restarts. Because it is vital for us that you get your money back ASAP, I do my best to scrutinize all receipts. I observed that it is better to return a report for correction after one day rather than two weeks. So please do not feel that the honorable officers or I am picky about the documentation.

Mistakes observed recently:
- Forgetting to provide a receipt for an item over $25 or its equivalent.
- Including a receipt with no date or indication that the balance was paid in full.
- Converting the amount paid to your native currency using your credit card activity. Always use the transaction currency that is listed on the receipt. In order to use the correct transaction currency select the correct location first.
- Using the event date instead of the date listed on the expense invoice receipt.
- NEW! Hotel charges do not have to be itemized anymore (as of October 2022.)

Conference Registration and Other IES Volunteering Activities:

AdCom travel typically does not cover conference registration. However, occasionally Presidents may decide to grant blanked approval of non-author conference registration. If that is the case for the particular conference that coincide with the AdCom meeting then this does not imply covering hotel stay outside of the days surrounding the main AdCom meeting and the preceding it VP committee meetings.

If you attend additional IES volunteering activities that are not directly the AdCom meetings the hotel and subsistence expenses for those days are covered from a different pile of money. You have to fill in a separate expense report with a different purpose level for those days. Examples include but not limited to Plugfest, Standards, SYP, TC meetings, WiE, and others. Each of the aforementioned activities has its own budged and expense purpose level.

Nontrivial examples:

- You visited England and used your contactless credit card as a ticket for the Underground Tube. There is no receipt, but your credit card activity shows the total for the daily tickets in your credit card's native currency, say $4.22. Reverse-engineer your local currency to GBP and round up to the reasonable ticket price. In this example, $4.22 turned out to be GBP3.61. The actual contactless credit card ticket from LHR to downtown was GBP3.60. So GBP3.60 has to be claimed.

- Say you live in the USA, but you pre-pay your upcoming hotel stay in the UK while visiting the EU. The travel website detected your EU location. Thus the transaction is in Euro and not US$ or GBP. If that is the case, select the place of purchase correctly in Concur so that the currency matches the currency of your receipt.

Concur Software quirks:

- Sometimes, it may be easier to delete an expense and reenter it as new instead of editing it.
- In some cases, specific edits can be more easily done from the website, while in others, from the Concur app on your phone. So use both, but edit an item only in one place at a time.
- After selecting and then uploading a receipt, save the new or updated entry.

I hope that this will be helpful for your upcoming paperwork. In case you are lost with a complex hotel invoice, I may be able to inspect it and suggest to you how to itemize it per day.

Yours truly

Olek
IEEE IES Treasurer