Dear Recipient of an Award of Industrial Electronics Society,

If you are impatient reader please read item (7) first – about choosing the correct purpose levels. Incorrect designation of your report will result in the report rejection and you possibly redoing it from the scratch may be easier than correcting it. Supplying incorrect award name may result in delayed processing.

I am a current treasurer for IEEE Industrial Electronics Society. As a treasurer I do not have any direct role in this program except for overseeing its financial side.

First, please accept my congratulations on receiving one of our prestigious awards.

You are most likely planning to attend one of our flagship conferences and receive the award in person. Please check with the Award Committee whether your award comes with the travel reimbursement stipend and/or with a non-author conference registration waver. This text is intended only as an outline of the travel reimbursement procedure. Do refer to the award description and the IEEE Travel Policy.

IEEE as a parent organization is required to follow accounting and tax practices of the location of its headquarters. One of such requirements is that the reimbursement should be processed within sixty days of the travel. If you submit the paperwork late the promised earlier reimbursement may be denied on the procedural grounds. Please strongly consider submitting the expense report within two weeks of completing your trip.

1) Various awards have different funding sources. Hence different limits on the travel expenses. Some awards do not offer travel reimbursement at all. Please do check the amount of the travel reimbursement stipend with Chair of the Awards Committee.

2) You do not have to pre-approve the expenses with the Awards Committee. However, in case the trip is not on a simple route work – conference – work, check whether it would be reimbursable with Chair of the Awards Committee.

3) The travel stipend is in the form of reimbursement of actual costs incurred up to the specified limit. It is not in a form of an advance of funds for travel. Your travel reimbursement is capped at the amount defined in the award. In case more authors are traveling the limit is combined for all who travels, it is not per person.

4) Only expenses allowed by the IEEE travel policy are going to be reimbursed. For example, only economy/coach non-refundable airline ticket, receipt for each expense above the equivalent of US$25, full receipt for the hotel that itemizes expenses for each day. Each expense should be entered in the currency it occurred with no manual currency conversion. The complete list of rules is posted at https://www.ieee.org/content/dam/ieee-org/ieee/web/org/travel-expense-reimbursement-guidelines.pdf

5) If you do not have an IEEE account you need to set up one. You do not have to be a member to have an IEEE account.

6) You use the same email that is used for the IEEE account to set up CONCUR account. https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report

It may take a few days to get the account created. I suggest that you do it even before your trip. You can put your expenses into the system as they are happening. Then after returning from your trip when there is no more expenses you submit the expense list inside the CONCUR system.

7) When starting the expense report you will be asked to describe the purpose of the trip and choose the account that pays for the trip.

7A) Make sure you include the exact award name both in the REPORT NAME and in the COMMENT. Otherwise, the process may be delayed as several people outside of the Awards Committee will have to perform a guess work what is the reason for the reimbursement.

7B) There are four "purpose levels" of the travel classification. Correct choice ensures that the paperwork goes through without being returned for correction.

The expense reimbursement levels for awards is as follows:
1. L1 - Technical Activities Societies
2. L2 - Industrial Electronic Society
3. L3 - President Elect Awards
4. L4 - AWARD

8) The procedure and reimbursement policies are very similar to those for IEEE employees and volunteers. However, there are some differences. For example, travel to receive an award is not considered volunteering and thus there is no IEEE Travel Health Insurance coverage. At the same time if you purchase such insurance it is not considered reimbursable expense.

9) Pay attention to the following form fields in each expense item:
- Transaction date which is the date when you made the purchase and is indicated on your receipt. That is not necessarily hotel checkout date, or date of travel by plane or rail.
- The currency. Before you enter the amount please enter the location where the purchase was made. That will select the correct currency. Do not convert amount manually to your native currency.

10) Once you complete your travel and enter the expenses, submit the Expense Report. At this point the estimated processing time at all stages is about three weeks. However, in case of discrepancies the document is returned to the originator for corrections and the process starts again as new.

Dr. Aleksander Malinowski
IEEE IES Treasurer