CONCUR REIMBURSEMENT GUIDELINES

Concur is the platform used by IEEE to process reimbursements and payments. This guideline has been prepared to assist IAS members to complete travel reimbursements on the Concur system. All information pertaining to Concur (FAQs, Training & Quick reference, informational video and Support Information) can also be found at the following link: IEEE Expense Report

Please follow the step-by-step guidelines below to process your travel reimbursement.

1. **Concur User Registration**

Click on the following link to open the IEEE Expense Report webpage:


The webpage below will open. Click on “Create Concur Account” under Step 1 of Concur Access on the right hand side of the webpage below as indicated with the green arrow.
The webpage below will open once you click “Create Concur Account.” Please log in to the webpage using your IEEE login credentials i.e. the same credentials you use to access your IEEE account.

Please create your concur profile by completing the Concur registration page. The information with a red asterix is compulsory. Please complete the registrations as follows:

For the two questions – please answer as follows:

1. Will you be submitting expense reimbursement requests through Concur? **Select Yes**
2. Would you like to book travel reservations through Concur Travel? **Select No**

The following profile information needs to be completed:

- First Name
- Middle Name (Optional)
- Last Name
- Email Address
- Member ID
- Country of Residence

Please click “Submit” after all the required information is completed.
The box below will appear once you submit the form.

Thank You

We have received your request for access to Concur. We are processing your request which can take up to 24 hours. You will access Concur via the link on the Volunteer Resource page.

For general questions regarding Concur, please contact concurfeedback@ieee.org.

It will take up to 24 hours for your Concur profile to be completed. Once your registration is complete and profile is created – you can proceed with your travel reimbursement.
2. **Access Concur and complete reimbursement**

Click on the following link to open the IEEE Expense Report webpage once your Concur Account is created.  


The webpage below will open. Click on “Access Concur” under Step 2 of Concur Access on the right hand side of the webpage below as indicated below.

![IEEE Corporate Activities](image)

The webpage below will open once you click “Create Concur Account.” Please log in to the webpage using your IEEE login credentials.

![IEEE - Sign in to access the secure content](image)
**Note:** The reimbursement currency in your Concur profile is based on your country of residence. If you reside in a country where one of the currencies listed below is considered the local currency, you must enter your banking information directly into Concur (select Profile > Profile Settings > Bank information).

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)

If your currency is **NOT** one of the four listed above, you will need to complete a one-time enrollment with Western Union in order to receive electronic reimbursements from IEEE. To enroll, please click on the following link and complete your registration. Please see Western Union information and step-by-step guideline for registration in Part 10 of this document.

https://payee.globalpay.westernunion.com/PayeeManager/BeneficiaryEnrollment/SpecifyPayeeID.aspx?id=F1810E0E0077373DA43DBACFF6679AAB

Please enter your 8-digit IEEE member number in the “Payee ID” field. You will need to complete your Western Union registration before completing your reimbursement.

**SAP Concur App:** You can also download the “SAP Concur” App from both the App Store for Apple users and on Google Play for Android users. Reimbursements can be done using the SAP Concur Application. To sign into the mobile app, use the code **EDDB6G** to enable single sign-on. A comprehensive video tutorial for the Concur App is available at the following link: https://corporate.ieee.org/resources/travel,-medical-and-insurance.ieee-expense-report/concur-training
Part 1: Start an Expense Report

Please follow the steps below to complete your Travel Reimbursement on Concur

Step 1: Click “Start a Report”

Step 2: Enter the Expense Report details as explained below and highlighted in yellow in the figure.

- Report Name: Enter the name of your expense report under Report Name. In the example below, the expense report was done for the IAS Annual Meeting.
- Report Date: The report date will automatically indicate the date you create the report. Leave the date as is.
- Enter any additional information regarding your Expense Report under the comments section.
- Expense Report Purpose Level 1: Select “Technical Activities Societies” from the dropdown menu
- Expense Report Purpose Level 2: Select “Industry Application Society” from the dropdown menu
- Expense Report Purpose Level 3: Select “Chapter” from the dropdown menu
- Expense Report Purpose Level 4: Select “(CHPTR) TA Societies – IAS – Chapter”

Once the information above has been selected, click “Next” on the bottom right of the page once done to proceed.
Step 3: The page below will appear. Click “New Expense” on the left hand pane as indicated by the green arrow once the new expense report window opens to select the various expenses to be included as part of the expense report.
Part 2: Airfare Expense Reimbursement

Please follow the steps below to add airfare reimbursements on Concur. The steps outline how to enter your flight ticket details and attach your flight ticket.

1. Step 1: Click on “Airfare” under “02. Transportation” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow below.

   ![Image](image_url)

2. Step 2: Enter Air Ticket Expense Details

The expense window for the airfare expense will pop out. Please enter your airfare details as follows and also highlighted in the figure:

- Expense Type: Keep as “Airfare”
- Transaction Date: Enter date that your ticket was purchased
- Ticket Number: Enter your ticket number (optional)
- From Airport: Enter the airport you departed from (if you cannot find your specific airport from the dropdown list provided – please email concurfeedback@ieee.org to add your airport)
- To Airport: Enter the airport you travelled to (if you cannot find your specific airport from the dropdown list provided – please email concurfeedback@ieee.org to add your airport)
- From Date: Enter the date you departed on (should be same as flight ticket)
- To Date: Enter the date you landed back home (should be the same as the flight ticket)
- Vendor: Select the Airlines from the list provided. If you cannot find your airlines, simply type in the name of your airlines.
- Airline Travel Service Code: Select class of travel from options provided. Coach class is the same as Economy class.
- City of Purchase: Enter the City of Purchase for your flight ticket (optional)
- Payment Type: Leave as “Out of Pocket”
- Amount: Enter the cost of the ticket. The cost will automatically appear in your local currency. The currency used in the example is ZAR, this can be changed by selecting the downward arrow and choosing the desired currency.
The air ticket used for the example below can be found in the appendix at the end of this document.

3. Step 3: Attach Air Ticket Receipt

Once you have completed all your airfare information, you can proceed to attach your air ticket/receipt. Please click “Attach Receipt” at the bottom right of the page as indicated with the green arrow below.
4. Step 4: Browse and Attach Flight Ticket Receipt

The window below will open. First click “Browse” to find and open the flight ticket to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Flight Ticket Receipt.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.

5. Step 5: Save the Airfare Expense

Once the flight ticket is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the flight ticket attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the airfare expense. The expense will now appear on the left pane under the “Expenses” section.
The Airfare expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.
Part 3: Conference Registration Fee Reimbursement

Please follow the steps below to attach your conference registration invoice on Concur under the Training/Seminar category

1. **Step 1:** Click on “Training/Seminars” under “08. Other” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

2. **Step 2:** Enter details for the Training/Seminars expense detailed below and highlighted in yellow in the figure below. The example below was completed using the registration invoice in the appendix.
   - Transaction Date: Enter date conference registration fee was paid
   - Enter Vendor Name: Enter conference name
   - City of Purchase (optional): Enter the city of purchase
   - Payment Type: “Out of Pocket”
   - Amount: Select the applicable currency and enter the amount indicated on your conference registration invoice. In the example below, the currency was in USD. The expense is automatically converted to your local currency.
   - Comment (optional): Enter any additional comments if applicable.
3. **Step 3: Attach Registration Invoice**

Once all the details of the conference registration is complete, Click “Attach Receipt” at the bottom right of New Training/Seminar Expense as indicated with the green arrow below.

4. **Step 4: Browse and Attach the Registration Invoice**

The window below will open. First click “Browse” to find and open the Registration invoice to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the invoice. In the example below, the document to be uploaded is “Registration Invoice.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.
5. Step 5: Save the Registration Fee Expense

Once the Registration Invoice is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Registration fee invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Registration fee expense. The expense will now appear on the left pane under the “Expenses” section.

The Registration expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.
Part 4: Hotel Fee Reimbursement

Please follow the instructions below to submit your Hotel expense

1. **Step 1:** Click on “Hotel” under “01. Travel Expenses” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

![Image of New Expense page]

2. **Step 2:** Enter details for the Hotel expense as outlined and highlighted in yellow in the figure below. The hotel invoice used in the example below can be found in the Appendix.

- **Expense type:** Type needs to be “Hotel”
- **Transaction Date:** Enter date the accommodation was paid (usually the check-in date)
- **Enter Vendor Name:** Select your hotel from the dropdown list or alternatively type in your hotel name.
- **City of Purchase:** Enter your city of purchase i.e. the city where the hotel is located.
- **Payment Type:** “Out of Pocket”
- **Amount:** Select the currency indicated on the hotel invoice and enter the amount for the hotel. In the example below, the amount was $241.40 in USD.

![Image of Expense entry details]
3. Step 3: Itemization of Hotel Invoice

Once the hotel expense details are entered, click on “Itemize” at the bottom right corner of the page as indicated in the next figure with the green arrow. Itemization is needed to itemize various fees on the hotel invoice i.e. room rate, room tax, tourism levy etc.

The Nightly Lodging Expenses window will appear below once the “Itemize” is clicked. Enter the details for the Hotel Accommodation as outlined in the figure below and highlighted in yellow.

- Check-in Date: Please enter the check-in date
- Check-out Date: Please enter the check-out date
- Number of Nights: Make sure the number of nights indicated is correct
- Room Rate: Enter the daily room rate as indicated in your invoice
- Room Tax: Enter any applicable daily taxes
- Additional Charges: Enter any additional charges if applicable

Click on Save Itemization at the bottom right corner when done. Make sure the itemization adds up to the total amount entered under hotel expense. In the example above, the total was $241.50. The amount was made up of the room rate ($209), city tax ($19.86) listed as room tax and state tax ($12.54) listed as other room tax 1.
Once all the itemization information is entered, click on “Save Itemization” at the bottom right of the page as indicated with the green arrow below.

4. Step 4: Attach the Hotel Invoice

Once all the details of the Hotel expense is complete and the itemization is done, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.
5. Step 5: Browse and attach the Hotel Invoice

The window below will open. First click "Browse" to find and open the Hotel Invoice to be attached. Once the document to be attached is visible under the "File Selected for uploading" section, click "Attach" to upload the invoice. In the example below, the document to be uploaded is "Hotel Invoice.pdf." The window below will close once you click "attach" and the receipt is successfully attached.

6. Step 6: Save the Hotel Expense

Once the Hotel Invoice is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Hotel invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Hotel expense. The expense will appear on the left pane under the “Expenses” section.
The Hotel expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense also includes the itemizations defined previously. The expense appears both in USD and in your local currency.
Part 5: Ground Transportation Reimbursement

Please follow the instructions below to submit your ground transportation reimbursement. Instructions are provided for both personal vehicle usage and claims using receipts.

5.1) Transportation Claim for Taxi

1. Step 1: Click on “Taxi, Bus, Uber, etc.” under “02. Transportation” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

2. Step 2: Enter details for the Taxi expense as outlined and highlighted in yellow in the figure below. The Taxi Receipt used in the example below can be found in the Appendix.

- Expense type: Type needs to be “Taxi, Bus, Uber, etc.”
- Transaction Date: Enter date the trip was made
- Enter Vendor Name: Enter the name of the vendor that provided the transportation service. In the example below, the vendor was “BWI Taxi Management Inc.”
- City of Purchase: Enter your city of purchase i.e. the city where the transportation service was rendered.
- Payment Type: “Out of Pocket”
- Amount: Select the currency indicated on the taxi receipt and enter the amount on the receipt.

Note: For Uber trips, the Uber receipt that is emailed to you can be used. The Uber receipt is normally emailed to the traveler immediately after their trip.
3. Step 3: Attach the Taxi Receipt

Once all the details of the travel expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.

4. Step 4: Browse and attach the Taxi Receipt

The window below will open. First click “Browse” to find and open the Taxi Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the invoice. In the example below, the document to be uploaded is “Taxi Receipt.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.
5. Step 5: Save the Taxi Expense

Once the Taxi Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Hotel invoice attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Taxi expense. The expense will appear on the left pane under the “Expenses” section.

The Taxi expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.
5.2) Personal Vehicle Usage

The instructions below pertain to usage of your own vehicle. The reimbursement is calculated based on your travel distance.

1. **Step 1:** Click on “Personal Car Mileage” under “02. Transportation” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

2. **Step 2:** Enter details for the Personal car mileage as outlined and highlighted in yellow in the figure below.
   - Expense type: Type needs to be “Personal Car Mileage”
   - Transaction Date: Enter date the trip was made
   - Purpose of the trip: Enter the reason the trip was made. In the example below, the reason is travel from “Hotel to Airport”
   - From Location: Enter the address or name of the location you departed from
   - To Location: Enter the address or name of the location you travelled to

Once you have entered the details above, click on the “Mileage Calculator” link at the bottom right as indicated with the green arrow.
The Mileage Calculator window as depicted in the figure below will open with the destinations indicated in the previous page. You can edit the locations on the mileage calculator if needed or add additional destinations. In the figure below, the additional destination can be added under waypoints as “C” indicated with the yellow circle. You also have the option to make a round trip by clicking on the “Make Round Trip” option. The total business distance is indicated at the bottom of the page.

Once all your locations have been added and you are satisfied with the trip, you can click “Add Mileage to Expense” at the bottom right of the page as indicated with the green arrow.
3. Step 3: Save the Mileage Expense

Once the Mileage expense is added, distance and amount will be automatically populated under the mileage expense as indicated with the yellow circle below. The amount will be reflected in your local currency. Click “Save” at the bottom right of the page to add the mileage expense to your expense report.

The Mileage expense will now appear under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.
Part 6: Meals Reimbursement

6.1 Individual Meal Reimbursement

1. **Step 1:** Click on “Individual Meals” under “03. Meals” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

2. **Step 2:** Enter details for the Meal expense as outlined and highlighted in yellow in the figure below.
   - Expense type: Type needs to be “Individual Meals”
   - Transaction Date: Enter date the meal was purchased
   - Enter Vendor Name: Enter the name of the restaurant/shop that the food was purchased from. In the example below, the vendor was “Burger King.”
   - City of Purchase: Enter your city of purchase i.e. the city where the meal was purchased from.
   - Payment Type: “Out of Pocket”
   - Amount: Enter the total amount on the meal receipt.
3. Step 3: Attach the Meal Receipt

Once all the details of the Meal expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.

4. Step 4: Browse and attach the Meal Receipt

The window below will open. First click “Browse” to find and open the Meal Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Meal Receipt 1.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.
5. Step 5: Save the Meal Expense

Once the Meal Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Meal Receipt attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Meal expense. The expense will appear on the left pane under the “Expenses” section.

The Meal expense now appears under the “Expenses” section of the Concur Expense Report as depicted below in yellow. The expense appears both in USD and in your local currency.
6.2) Meals with Guests Reimbursement

1. **Step 1:** Click on “Meals with Guests” under “03. Meals” which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

2. **Step 2:** Enter details for the Meal expense as outlined and highlighted in yellow in the figure below.
   - Expense type: Type needs to be “Meals with Guests”
   - Transaction Date: Enter date the meal was purchased
   - Enter Vendor Name: Enter the name of the restaurant/shop that the food was purchased from. In the example below, the vendor was “Burger King.”
   - City of Purchase: Enter your city of purchase i.e. the city where the meal was purchased from.
   - Payment Type: “Out of Pocket”
   - Amount: Enter the total amount on the meal receipt.
   - Attendees: Enter the names of attendees. Click on “New Attendee” to enter the details of each attendee.
- The name of the person submitting the expense report automatically appears on the attendee list. For each new attendee, select the “Attendee Type”, Last name of the attendee (compulsory), first name of the attendee (optional), attendee title (optional) and Company name (compulsory).
- Click “Save & Add Another” to add more attendees.
- Click “Save” once all the attendees have been added.
- The full list of attendees will appear under attendees once complete.
- The bill will be automatically split amongst all the attendees.

### 3. Step 3: Attach the Meal Receipt

Once all the details of the Meal expense is complete, Click “Attach Receipt” at the bottom right of the expense as indicated with the green arrow below.
4. **Step 4: Browse and attach the Meal Receipt**

The window below will open. First click “Browse” to find and open the Meal Receipt to be attached. Once the document to be attached is visible under the “File Selected for uploading” section, click “Attach” to upload the receipt. In the example below, the document to be uploaded is “Meal Receipt 2.pdf.” The window below will close once you click “attach” and the receipt is successfully attached.

![Attach Receipt Image]

5. **Step 5: Save the Meal Expense**

Once the Meal Receipt is attached, the attachment will be visible under the “Receipt Image” Tab. Click on the tab to view the Meal Receipt attachment and ensure that the correct attachment is attached. Finally, click “Save” on the bottom right corner of the Meal expense. The expense will appear on the left pane.

![Meal Expense Image]
Part 7: Attach Signed Expense Report (CMD)

All CMD travel expenses need to include an expense report signed and approved by either the CMD Chair (Lesley Arakkal) or the CMD Director (Peter Magyar). The signed expense report will need to be uploaded on the Concur platform as part of the expense report. Please follow the instructions below to upload the expense report.

No CMD Reimbursements will be Approved without the signed Expense Report attached.

1. **Step 1:** Click on “Receipts” which can be found on the top left hand pane as indicated in the figure below. A dropdown menu will appear once you click “Receipts.”

2. **Step 2:** The dropdown menu indicated in the figure below will appear once you click on “Receipts.” Please select “Attach Receipt Images” from the dropdown menu. The option is highlighted in yellow in the figure below.
3. **Step 3:** The Receipt Upload and Attach window will pop out once you click on “Attach Receipt Images.” Click “Browse” to find and open your signed expense report. Once the Expense report is listed under “Files Selected for uploading”, click on “upload.” In the example below, “Expense Report.pdf” is the file that was uploaded.

![Receipt Upload and Attach window](image)

4. **Step 4:** Once the Expense Report is uploaded, click “close” to close the window.

![Receipt Upload and Attach window](image)

**Note:** The example of a signed expense report can be found at the end of this document in the Appendix.
Part 8: Submit the Expense Report

Once all the expenses are listed on the left hand pane of your expense report, you can proceed to submit your expense report. Please check and ensure that the total at the bottom of the page is the correct amount to be reimbursed to you. You can then submit your expense report by clicking on the orange “Submit Report” button at the top right corner of the expense report.
Part 9: Additional Information

Currency Conversion Fee: If the currency conversion in Concur differs from the amount charged from the amount charged to your credit card, you are entitled to add a separate lump sum line item as “Currency Exchange Fees” to your expense report. No receipt documentation is required when submitting a line item for “Currency Exchange Fees.”

Please follow the instructions below to claim “Currency Exchange Fees.”

1. **Step 1:** Click on **“Currency Exchange Fees”** under **“07. Fees”** which will appear as one of the options under New Expense in the right hand pane as indicated with the green arrow.

![Image showing the Concur interface with the green arrow pointing to the Currency Exchange Fees option](image1.png)

2. **Step 2:** Enter the details below for the Currency Exchange Fees
   - **Transaction Date:** Enter the date of the transaction
   - **Enter Vendor Name:** Enter the name of the Vendor (Optional)
   - **City of Purchase:** Enter the details of the city of purchase (Optional)
   - **Select the currency to be used.**
   - **Enter the amount:** Enter the difference between the amount indicated on your credit card statement and the amount listed on the expense report for the respective transaction.

![Image showing the Concur interface with highlighted fields for entering currency exchange fees](image2.png)

Finally, Click on “Save” at the bottom right of the expense to add the “Currency Exchange Fees” as part of the expense report.
Contact Details for Assistance: The information below provides contact information for SAP Concur’s Support Desk.

1. Online Submission - Available 24/7/365
   - Users can enter the end-user support portal by logging into SAP Concur with your existing credentials and clicking on the Contact Support option in the Help menu in the upper right-hand corner of SAP Concur. Once in the end-user support portal, click “+Create a Case.”
   - Please use the Contact Support option noted above to check status of, update, and open new cases online. Cases can be created 24/7/365.

2. Live Chat - Available 24/7/365
   - At this time, support is provided in English only.
   - To get to Chat, click on the Contact Support option within the Help menu of your SAP Concur Program and then "Chat with support."

3. Phone Support - Available in English 24/7/365
   - US, Canada and Puerto Rico – 1 866 793 4040
   - To access the complete list of contact telephone numbers depending on country from which you are calling:
     o Click the Contact Support option within the Help menu of your SAP Concur Program to access the end-user support portal.
     o Click the “View global phone numbers” link in the “Support hotline” box on the right side of the screen.
     o Select the telephone number that corresponds to the country from which you are calling.

4. Or contact IEEE’s project team at concurfeedback@ieee.org for general assistance or questions regarding Concur.
Part 10: Western Union Registration (Other Currencies)

Note: This section is only for recipients who reside in a country which does not make use of any of the currencies listed below:

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)

If your currency is not listed above, you need to register with Western Union for your payment to be processed.

Step 1: Click on the following link to open the Western Union Registration site:

https://payee.globalpay.westernunion.com/PayeeManager/BeneficiaryEnrollment/SpecifyPayeeID.aspx?id=F1810E0E0077373DA43DBACFF6679AAB

Step 2: Enter your IEEE number for Payee ID and select “IEEE Enrollment Campaign” for Campaign Name. Click Next at the bottom right of the page to proceed with registration.
Step 3: Complete all your details for the beneficiary enrollment. Enter your name, address, city, country, province/state, postal code and phone number. Click Next to proceed.

Step 4: Enter your first name, last name, email address and phone number. Click Next to proceed once completed. Click Next to proceed.

Step 5: Enter a new username and password for your Western Union profile. Choose a security question and answer in case you forget your login credentials. Click Next to proceed.
Step 6: Provide your bank details – bank account number, name on bank account, bank country and currency. Also provide additional details – bank name, bank SWIFT number and bank address. Finally complete your pay-alert email and language information. Click Next to proceed.
Step 7: Finally tick acceptance of service agreement and Click Submit Enrollment Request at the bottom right of the page.

You will receive the email below from Western Union once your Enrollment is complete. You will now be able to receive reimbursements directly to your personal bank account.

Hello John Doe,

Your enrollment as a beneficiary for client Institute Of Electrical & Electronic Engineers has been approved.

You can now access Western Union GlobalPay Payee Manager, our secure vendor self-management service enabling you to:

Manage
Update your contact and bank account information online

Track
Track the status of your incoming payments to help you better manage your own cash flow.

To access Payee Manager, click Here and log in using the credentials you supplied during your enrollment, or using the credentials provided to you.

Thank you,

IEEE
Institute Of Electrical & Electronic Engineers
1. **Air Ticket Example**

All Air tickets should have the traveller’s full names, travel itinerary (departure and arrival dates), names of departure city/airport name and destination city/airport name and price of ticket. The example air ticket below is used in the Concur guidelines in Part 2 for air ticket reimbursement. The information used in the Concur reimbursement is highlighted in blue below.
Your travel information

Departing From New York, United States

Leg 3 of 4 | New York John F Kennedy (JFK) to Dubai (DXB) | Operated by Emirates (equipment owner - Emirates)

**Flight**
- EK 202
- Check-in Open: 04 Oct 2019
- Departure: 20:00
- Arrival: 05 Oct 2019
- Status: Confirmed
- Seat: 47G

**New York**
- Departing JFK John F Kennedy International Airport
- Terminal 4

**Dubai**
- Arriving DXB, Dubai International Airport
- Terminal 3

**Johannesburg**
- Arriving OR Tambo International Airport
- Terminal A

Leg 4 of 4 | Dubai (DXB) to Johannesburg (JNB) | Operated by Emirates (equipment owner - Emirates)

**Flight**
- EK 767
- Check-in Open: 04 Oct 2019
- Departure: 05 Oct 2019
- Arrival: 06 Oct 2019
- Status: Confirmed
- Seat: 41K

**Total fare (incl. TFC)**: ZAR 10863.93

**Fare calculation**
- JNB EK XIDX DX NTC - NY on 45.662K LXESZAI A1 EK XIDX EK JNB292.96W LWE SZA N1 TUC442.62 RX JFK ZARJ4.95 REND ROE 14.103 331

**Additional information**
- NON-END/FLEX
2. **Registration Invoice Example**

The example registration invoice below is used in the Concur guidelines in Part 3 for conference registration fee reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

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**Receipt/Invoice**

IEEE  
445 Hees Lane  
Piscataway, NJ 08854  
United States  
Tax ID: 13-1656633

To: John Doe  
Westville University  
88 Willow Street,  
Denver  
USA

Event Title: IAS 2019  
Event Location: Baltimore, Maryland, United States  
Event Dates: 29 September - 3 October, 2019  
Confirmation Number: 1294

Order: IAS20191294

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<td>$350</td>
<td>1</td>
<td>$350</td>
</tr>
<tr>
<td>StudentIEEE Member Early</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>CMD Dinner</td>
<td>$125</td>
<td>1</td>
<td>$125</td>
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</table>

Order Total: $475

Payment Details:

<table>
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<th>Type</th>
<th>Amt Paid</th>
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</thead>
<tbody>
<tr>
<td>06-21-2019</td>
<td>American Express</td>
<td>$475</td>
</tr>
</tbody>
</table>

Prepared by:  
Tonya Stanback  
IEEE Registrar  
IEEE Meetings, Conferences, and Events

All fees shown above are in US Dollars (US$).
3. **Hotel Invoice Example**

The Hotel invoice below is used in the Concur guidelines in Part 4 for Hotel fee reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

---

**Hilton Baltimore**

401 West Pratt Street  |  Baltimore, MD  |  21201
T: 443 573 8700  |  F: 443 683 8841
W: baltimore.hilton.com

**NAME AND ADDRESS:**

John Doe
88 Willow Street, Denver, USA

**Room:** 1127/D2
**Arrival Date:** 10/3/2019 12:13:00 PM
**Departure Date:** 10/4/2019

**Adult/Child:** 10
**Room Rate:** 209.00
**Rate Plan:** 2G
**PP:**
**AL:**
**Car:**

**Confirmation Number:** 3149257198

10/4/2019

<table>
<thead>
<tr>
<th>DATE</th>
<th>DESCRIPTION</th>
<th>ID</th>
<th>REF. NO</th>
<th>CHARGES</th>
<th>CREDITS</th>
<th>BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/3/2019</td>
<td>GUEST ROOM</td>
<td>4870847</td>
<td></td>
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<td>$209.00</td>
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<tr>
<td>10/3/2019</td>
<td>CITY TAX (R)</td>
<td>4870847</td>
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<td></td>
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<td>$19.86</td>
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<tr>
<td>10/3/2019</td>
<td>STATE TAX (R)</td>
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<td>$12.54</td>
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<tr>
<td>10/4/2019</td>
<td>TOTAL</td>
<td>4871457</td>
<td></td>
<td></td>
<td></td>
<td>($241.40)</td>
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<td></td>
<td><strong>BALANCE</strong></td>
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</table>

---

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4. **Taxi Receipt Example**

The Taxi Receipt below is used in the Concur guidelines in Part 5 for Ground Transportation reimbursement. The information used in the Concur reimbursement is highlighted in blue below.

![Taxi Receipt Example](image)

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Please refer to rate schedules in each taxicab. Should you have any questions regarding lost articles or service, please contact BWI Taxi Management, Inc. (410-859-1102) or the Maryland Aviation Administration (410-859-7033). Thank you.
5. **Expense Report Example (Signed by both the Travel Recipient and the CMD Chair)**

Below is an example of an expense report form filled out for an expense report. The form is specific to The Institute of Electrical and Electronics Engineers, Inc. and includes sections for various expenses, such as Mileage Allowance, Hotel, and other travel expenses. The form is signed by both the Travel Recipient and the CMD Chair.

### Expense Report

**Name:** JOHN DOE  
**For Period Ending:** 15 JULY 2019

**Details of Trip:**
- **Personal Auto Usage:** (Enter "X")
- **Mileage Allowance:** $0.59/Mile, $0.36/Km in US$  
- **Transit - Tolls & Parking:** $0.00  
- **Taxi/Bus - See Itemized Expenses:** $0.00  
- **Business Travel Allowance (Provide Backup):** $0.00  
- **Lodging - Self:** $649.57  
- **Meals/Self - See Itemized Expenses:** $0.00  
- **Official Guest - See Itemized Expenses:** $0.00  
- **Miscellaneous - Tel & Telegraph:** $0.00  
- **Tips & Gratuities:** $0.00  
- **Other (5) - complete section below or provide receipt:** $0.00  
- **Other (6) - complete section below or provide receipt:** $0.00

**Total Expense w/o Mileage Allowance:** $1250

**Currency Conversion Rate:** 1.00

**Total Balance due w/Mileage Allowance from/to IEEE:** $1250

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**Entity:**  
**Bus Unit:**  
**Cost CTR:**  
**ACCT:**  
**PROJ:**  
**AMOUNT:**

**Distribution Total:** $0.00

---

**Originator's Name & Signature:** JOHN DOE  
**Date:** 15-July-2019

**Approved By:** Lesley Arakkal  
**Date:** 10 October 2019

By signing and submitting this reimbursement request to IEEE, I attest all expenses identified on this expense report have been used solely for the purposes of IEEE business. I also certify these expenses have not been previously reimbursed by IEEE.