IEEE-CSS Summarized Travel Guidelines

Itemized areas of the <u>expense report form</u> **must be completed as indicated below**. **The form will be returned if not correctly completed.**

<u>Transportation</u> – Most economical airfare should be used. If travel is by other means (train, private car), reimbursement will be the actual cost, as long as it does not exceed what the most economical airfare would have been. **We require all IEEE staff and encourage all others to make transportation arrangements through the IEEE Travel Service.** Mileage will be reimbursed at the current approved rate by IEEE (57.5 cents/mile for travel after 1/1/2015). Car rentals should only be used when economical public transportation is unavailable and impractical.

<u>Lodging</u> – Single room occupancy will be reimbursed.

<u>Receipts</u> – Receipts for any single expenditure in excess of $25 must be provided or will not be reimbursed. Receipt must show payment (e.g. restaurant check and receipt showing payment; airfare showing payment – not just a quote). IEEE would prefer that receipts for smaller amounts be included.

<u>International Travel</u> – Payments (i.e., advances and reimbursements) will be made in the currency preferred by the individual. Each payment is handled on an individual basis as requests for reimbursement can vary from trip to trip and, therefore, are not determined by the country the individual resides in. Only one expense report is necessary for each trip and should be prepared in only one currency. Proof of expenses and exchange rates should be submitted. Cash items are calculated at the supplied exchange rate. If no rate is supplied, the current rate is used. Should a future credit card billing to an individual result in a loss to the individual based on the exchange rate determined by a credit card company, a request for additional reimbursement should be submitted, including a copy of the original reimbursement request and a copy of the credit card billing showing the actual billed amount.
<u>Wire transfers</u> may be requested for international (non-U.S. reimbursements).

<u>Volunteer Global Travel Accident Medical Plan</u> – IEEE maintains a Global Travel Accident Medical Plan ("The Plan") to protect IEEE volunteers who become ill, or injured, and require immediate medical attention while traveling on authorized IEEE business outside of their country of permanent residence. Consequently, IEEE does not reimburse volunteers for traveler's medical insurance coverage purchased in addition to airfare.

<u>Approval and Forwarding</u> – Society Volunteers – Advanced approval from the cognizant CSS Vice President or Editor is required. Forward the approval and completed expense form (with required documentation) to the CSS <u>Vice-President for Financial Activities</u> , who will review and forward for processing.

<u>Exceptions</u> – Any exceptions to current IEEE policy could result in a delay in the processing of an expense reimbursement. Therefore, **a written explanation** of the circumstances for the exception to policy should be submitted along with the expense report, so that approval can be obtained from the appropriate Staff Executive or their designee at that time. Any adjustments to an expense reimbursement will be noted on the reimbursement check stub.

<u>Additional Assistance</u> – More detailed instructions are available in the **"<u>Travel Reimbursement Procedures Manual</u>,"** or by contacting the CSS Vice-President for Financial Activities.

The Institute of Electrical and Electronics Engineers, Inc.

Expense Report

2015

Name:	For Period Ending: End date of travel
Send check to the following address :	Member of: Other
	If Other, please describe :
	Eg. Chair, XX Committee

Member No.

Supplier No.

Site:

Provide details and full support
on items (1) through (6)

Purpose of Trip - Note each day's activity

XX Meeting

Details	Date Town									Total Expense	Chrg. Dir. to IEEE(7)
		KM	Mile	PERSONAL AUTO USAGE MAKE ONLY ONE CHOICE, MILES OR KILOMETERS							
Personal Auto Usage : (Enter " X ")										NO	
Mileage Allowance ($0.575/Mile,$0.357/Km) in US$				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Trans. - Tolls & Parking										0.00	
Taxi/Bus - See Itemized Expenses (1)										0.00	
Plane, Train, Auto Rental (Provide Backup)										0.00	
Lodging - Self										0.00	
Meals/Self - see Itemized Expenses (2)										0.00	
Official Guest - see Itemized Expenses (3)										0.00	
Miscellaneous - Tel. & Telegraph										0.00	
Tips & Gratuities (4)										0.00	
Other (5)										0.00	
Other (6)										0.00	
Total Expense w/o Mileage Allowance				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Enter daily expense

These fields will automatically populate from second page

	Currency Conversion Rate	1.000
	Total Expenses wo/Mileage Allowance in US $	0.00
	Mileage Allowance in US$ w/Conversion	0.00 0.00
Provide details below and attach full support on items 5 & 6	Less Charged Directly to IEEE in US$	0.00
(5)	Less Advance from IEEE in US$	0.00
	Total Balance due w/Mileage Allowance from(to) IEEEw/conversion	0.00
(6)	Total Balance due w/Mileage Allowance from(to) IEEE in US$	0.00

ENTITY	BUSI.UNIT	COST CTR	ACCT	PROJ	AMOUNT
DISTRIBUTION TOTAL					0.00

Originator's Signature: Date:

Approved By: Approved By: Date:

Itemized Expenses

Taxi/Bus (1)
Note: receipts are required for amounts over $25.00. Enter daily totals on page 1.

Date:	Fare:	To/From:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Meals/Self (2)
Receipts are required for amounts over $25.00. Daily amounts are automatically carried over to page 1.
Daily expenses are not to exceed $100.00 USD without written explanation -
(see FOM.6 - BUSINESS EXPENSE REPORTING).

Date:	Breakfast	Lunch	Dinner	Social
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Meals/Official Guests (3)
Daily amounts are automatically carried over to page 1.

Date:	Amount:	Description
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Tips & Gratuities (4)
Note: Please provide receipts for tips & gratuities over $25.00. Enter daily totals on page 1.

Date:	Amount:	Description
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

12/28/2014