

IEEE Canada

2024 Expense Claim Guidelines (V1)

General

- IEEE Canada members are responsible for **reducing** the costs of their participation in IEEE Canada activities
- Any IEEE Canada member traveling by air **must** book their travel a minimum of three weeks in advance of travel. IEEE Canada members incurring excessive airfare costs by not following this guideline will only be reimbursed with the approval of the ExCom. IEEE Canada will not pay for higher class air fares, for example Air Canada Comfort or WestJet Premium.
- IEEE Canada requires the approval of all overseas travel by ExCom before any booking are made.
- IEEE Canada members will book their flights directly with carriers and not through third parties unless they get prior written approval from the IEEE Canada Treasurer based on demonstrated savings.
- IEEE Canada Committee Chairs are responsible for staying within **approved** project scopes and committee budgets.
- IEEE Canada Director has delegated the responsibility for Expense Claim approvals to the Treasurer.
- Expense reports will be submitted and reimbursed through [NextGen Expense](#)
- These guidelines shall remain in force for the **2024** calendar year.
- Deviation from these guidelines requires prior **written approval** of either the Director or Treasurer.

Travel

- Travel must comply with Expense Reimbursement Guidelines for IEEE Volunteers (August 26, 2022), but where there is a conflict, the IEEE Canada Expense Guidelines take precedence.
- Expense Claims must be submitted within **30 days** of the expenses being incurred.
- **Original receipts** must accompany each item claimed, and there is **no per diem** option.
- Expense Claims must be submitted through Concur and follow all IEEE guidelines.
- Car Allowance is published in Concur and subject to change and reimbursable up to the equivalent of the advanced airfare for those members who choose to use their own vehicle.
 - Enter start and end destination in Concur and for distances 200+ km one-way **submit** an airfare quote for the dates of travel obtained at least 30 days prior to travel for the lowest fare available.
- Car rentals **are not** a reimbursable expense, unless prior written approval is obtained from the IEEE Canada Treasurer or backup is provided that demonstrates that the car rental is lower cost than the airfare.
 - Two drivers are permitted when driving distances over 200km.
 - Purchase of car rental insurance is permitted, but is included when considering the cost of the car rental versus flying.
- When driving carpooling is strongly encouraged.
- IEEE Canada will reimburse members for the use of Ground Transportation (Taxi/Shuttle/Bus, etc). Use of a Limousine Service is **not** a reimbursable expense.
- Telephone calls and hotel Internet charges **are not** a reimbursable expense.
- IEEE Canada **will not** reimburse members for flight cancellation insurance and fees associated with the use of Travel Agents, Seat/Flight Upgrades and Seat Selection. IEEE Canada **will** reimburse IEEE Canada Members traveling on Region business for travel life insurance.
- **Advance** funds for purchase of airline tickets are available one month prior to the event. An Expense Claim must be filed along with receipts. The advance must be shown on the meeting Expense Claim along with submission of the airline ticket.
- Origin and destination information must be provided on the expense form in order to receive payment.
- All flight receipts must show the fare class of the ticket and the GST / HST paid.

Canada Meetings

- IEEE Canada provides and pays for hotel (spring – Thursday (if attending training session), Friday, Saturday and fall – Friday, Saturday) and meal expenses at Region Meetings.
- Additional hotel expenses require the prior written approval of the IEEE Canada President or Treasurer.
- Reasonable meal expenses incurred during travel to and from the IEEE Canada meeting will be paid.

- IEEE Canada shall pay all travel costs for one delegate to the Spring and Fall Region meetings from each Section.
- Meal expenses are not reimbursable when they coincide with meals provided at the meeting unless required for travel reasons.
- Expenses related to spouses/partners attending Region 7 Meetings must comply with IEEE the latest release of *Expense Reimbursement Guidelines for IEEE Volunteers*. In general, expenses for spouses/partners is not reimbursable.
- Expense Reports for attending IEEE Canada meetings will be limited to \$1000 unless **written approval** of either the Director or Treasurer is obtained in advance in extenuating circumstances.

Committee Expenses

- Committee Chairs are required to approve Expense Claims for approved committee activities.
- Committee Chairs are permitted to commit funds in line with approved activities and budgeted amounts.
- Committee Chairs must obtain the prior written approval of the Director or Treasurer to change either the approved activity or budget for their committee. Failure to do so may result in non-payment of the expense.
- Annual Committee Budgets must follow the following guidelines:
 - Travel budget is only approved where it is for:
 - Travel to IEEE MGA or Region arranged and volunteer training focused events
 - Travel to IEEE MGA or Region arranged meetings to conduct the business related to your volunteer role
 - Where required for your volunteer role, travel to a Region 7 event to complete the work required for your position.
 - Travel budget is not permitted for:
 - Sending a secondary delegate or a volunteer for any travel purposes (only where they are taking the place of the Region Committee Chair / Representative / Coordinator)
 - Special projects are not permitted in Committee Budgets, there is a Region special projects budget which committees are encouraged to use where appropriate.
 - Committee budgets must never be used for any conference registration (Region conference or otherwise).
 - General office supplies / misc budget / contingencies are not permitted, the Region has contingencies in place and where required for a small Committee expense, these can be requested from the Region Treasurer without requiring a budget amendment.
 - Valid exceptions to these guidelines exist, and will be considered as separate motions outside the annual budget request.

Limits

- Expense Claims submitted without original receipts and/or more than 30 days after the expense has occurred may require the approval of the IEEE Canada Excom, at the Treasurer's discretion.
- Expense Claims where ever possible should be submitted by Dec 1st.
- They must be reviewed and approved at the IEEE Canada Fall Meeting.
- The Treasurer must submit any of his/her non-Concur Expense Claims to the Director-Elect for approval.
- Pandemic related limitations:
 - All IEEE volunteer travel and associated meetings must adhere to appropriate guidance from cognizant local public health authorities.
 - Volunteers engaged in IEEE travel at this time voluntarily elect to participate in the activity with knowledge of the dangers involved. Volunteers should understand that IEEE will not indemnify them for any health risk or economic or other loss resulting from exposure to COVID-19 during travel.
 - IEEE will not reimburse costs associated with mandatory or self-quarantine or isolation associated with IEEE volunteer travel. If there is a risk of quarantine on entering or departing an area, IEEE volunteers should instead plan to participate virtually using IEEE video and teleconferencing tools.