IEEE CEDA Student Travel Grant Program

Travel Grant reimbursement policy − Important information :

- IEEE CEDA Student Travel Grants are awarded as reimbursements after receipts are submitted. Your expense report and receipts must be submitted using the NextGen Expense Reimbursement system (also known as Concur) **within 30 days after the event and no later than Nov. 20 of the current year (for conferences taking place before that date).**

- The spirit behind the CEDA Student Travel Grants is to provide a financial support to allow students travel to conferences, who would otherwise have no means of funding their trip to the conference. Therefore, student travel grants **can solely cover expenses incurred by the grantee.** A responsible and sensible use of the grant is required: in no cases the student travel grants can be shared with other students or used to pay any cost to a third person.

- In order to apply for the reimbursement, you must register in the system with your IEEE Student Membership into Concur. To do so, you will need to follow all the steps provided in this link:
    - https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report
  Follow the instructions provided on the link above to create an account (linked to your IEEE student account) to then access concur to submit your expenses.

- In this system, in order to be approved by IEEE CEDA, it is needed to include PDFs or images of all the receipts according to the initial approved budget of expenses for the Student Travel Grant. All expenses submitted for reimbursement need to be in the applicant's name with full name and date of purchase visible.

- If IEEE CEDA has questions about any of the expenses, the submitted form in IEEE Concur will be returned to you for clarification. Thus, please include clear descriptions of the itemized expenses that match the approved budget in the Student Travel Grant.

- All expenses need to be compliant with the IEEE Travel Reimbursement guidelines, which can be found in this link: https://www.ieee.org/content/dam/ieee-org/ieee/web/org/travel-expense-reimbursement-guidelines.pdf
  Failure to comply with this guidelines will result **in expenses not being reimbursed.**

Steps for creating your travel expense report in Concur:

Once you have set up your account in Concur, access the system using this link: https://ieee.org/concur

Note: You cannot access via the site concur.com (typing "Concur" on google will not lead you to the correct link).

The steps you need to take to create your report are the following:

1. If you are a first-time user in Concur, make sure to complete your Personal Information in the "Profile" tab, as well as your bank information.

2. If you reside in a country where either USD (US Dollar), EUR (Euro), CAD (Canadian Dollar) or INR (Indian Ruppee) is considered the local currency, you must enter your banking information directly into Concur (select Profile > Profile Settings > Bank information), as shown on the image below.

   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

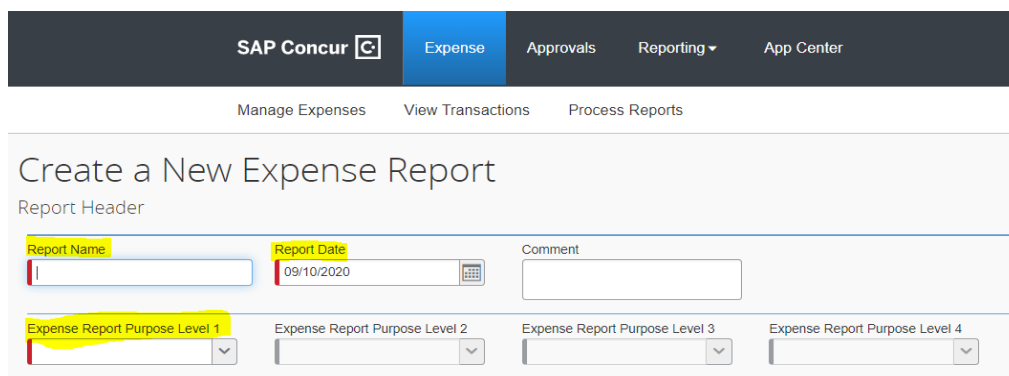enroll, please complete the required registration form. Enter your 8-digit IEEE member number in the "Payee ID" field.

Questions regarding the Western Union registration process can be forwarded to Western Union by email at epayvendormanagement@westernunion.com or by phone at +1 800 815 2460 option 1. For all other general inquiries, please continue to contact the IEEE project team at nextgenexpense@ieee.org.
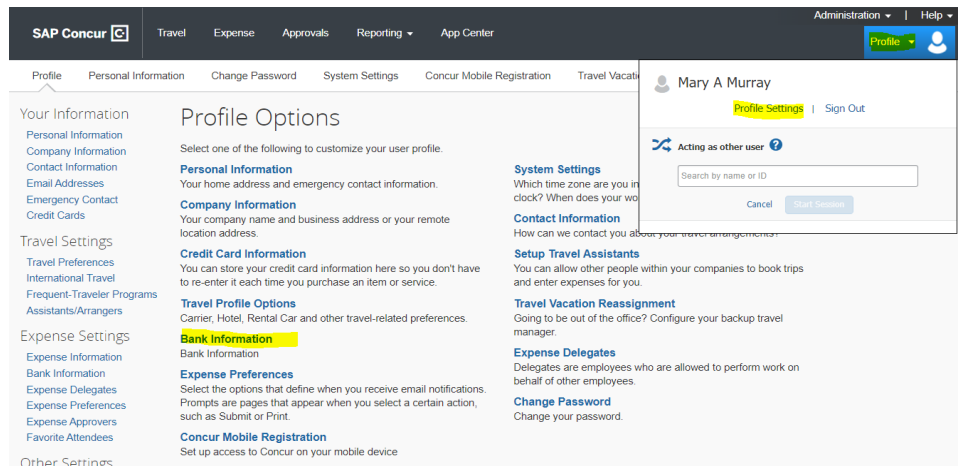
3. Create a new expense report by going to the "Expenses" tab and hitting on "Create New Claim".

4. You will need to fill-in the Expense Report Header below. This is an **very important step** that needs to be done carefully to ensure your expense report reaches the right approver.

   Please make sure to:
   - Choose a meaningful report name
   - Expense report purpose Level 1: **Technical Activities Societies**
   - Expense report purpose Level 2: **Electronic Design Auto. Council**
   - Expense report purpose Level 3: **Student Support**
   - Expense report purpose Level 4: **00000**

5. Create new expenses by adding them to the correct category and attaching the receipt. Make sure to correctly set the transaction date.
   For flight tickets, this date should match the date of issuance of the ticket.

6. Once all expenses have been entered into Concur, you can **submit** your expense report.
   Once you have done that, you will be able to check the approval flow (go to your expense report and click on "Details → Approval Flow", and also view the estimated date of payment by clicking on "Details → Report Payments".

About this document:

The goal of this document is to describe the most important steps required for creating an expense report in Concur. A complete manual and FAQ can be found in the IEEE website.

- A comprehensive online video tutorial can be found in this link: https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report/concur-training. You are advised to refer to this training in case of questions.

Versioning:

- v1.0 – Document created by Marina Zapater (IEEE CEDA VP of Finance 2022-2023) on 15th Sept. 2022
- v2.0 – Added a point on the responsible use of the grant money, which should solely go to the grantee, by Marina Zapater (IEEE CEDA VP of Finance 2024-2025) on 20th June. 2024