

# IEEE Corporate Activities



# Submitting a Claim for Reimbursement

Finance | Legal | Contacts & Rosters | News

/ Home / Resources / Travel, Medical and Insurance / IEEE Expense Report

## IEEE Expense Report

### NextGen Expense Reimbursement

View a recorded DEMO featuring Concur's New User Interface which launched on September 26, 2022.

Slide Deck of Concur's New User Interface (PPTX, 5 MB)

Please note: the system's functionality did not change, however, you may notice some visual changes which we cover in the both the recording and slides posted above. Any questions, please send an email to: [NextGenExpense@ieee.org](mailto:NextGenExpense@ieee.org)

The NextGen Expense Reimbursement tool is an automated platform that is designed to be fast, easy, and efficient. IEEE volunteers will save time with a streamlined experience, with IEEE directly reimbursing you. Plus, you can use the [mobile app](#) for easy on-the-go expense reporting.

NextGen Expense Reimbursement is part of the IEEE NextGen platform. [Learn more.](#)

#### Important:

The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through [ieee.org/expense](https://www.ieee.org/expense), not [concur.com](https://www.concur.com).

All users will need an [IEEE account](#) (IEEE username and password) to access the platform.

### NextGen Expense Reimbursement Checklist

Do you need assistance? [Refer to this checklist](#) (PDF, 233 KB) for help

#### Access

##### Step 1: How to Get Started

Request an IEEE Account  
(Skip if you have one)

Create Your Expense  
Reimbursement Account

##### Step 2: Access

Log In  
(May require IEEE Network login)

##### Step 3:

Download the App

URL: [ieee.org/expense](https://www.ieee.org/expense)

If you have not previously requested a NextGen account you may do so in “Step 1”

It will take about 24 business hours to have your account approved



# IEEE Corporate Activities



## Submitting a Claim for Reimbursement

Finance | Legal | Contacts & Rosters | News

/ Home / Resources / Travel, Medical and Insurance / IEEE Expense Report

Once your account is approved you will also need to create an Expense Reimbursement account

You will need your IEEE membership number and bank account information (available at the bottom of your cheques or at request from your bank)

### IEEE Expense Report

#### NextGen Expense Reimbursement

[View a recorded DEMO featuring Concur's New User Interface which launched on September 26, 2022.](#)

[Slide Deck of Concur's New User Interface \(PPTX, 5 MB\)](#)

Please note: the system's functionality did not change, however, you may notice some visual changes which we cover in the both the recording and slides posted above. Any questions, please send an email to: [NextGenExpense@ieee.org](mailto:NextGenExpense@ieee.org)

The NextGen Expense Reimbursement tool is an automated platform that is designed to be fast, easy, and efficient. IEEE volunteers will save time with a streamlined experience, with IEEE directly reimbursing you. Plus, you can use the [mobile app](#) for easy on-the-go expense reporting.

NextGen Expense Reimbursement is part of the IEEE NextGen platform. [Learn more.](#)

#### Important:

The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through [ieee.org/expense](http://ieee.org/expense), not [concur.com](http://concur.com).

All users will need an [IEEE account](#) (IEEE username and password) to access the platform.

#### NextGen Expense Reimbursement Checklist

Do you need assistance? [Refer to this checklist](#) (PDF, 233 KB) for help

#### Access

##### Step 1: How to Get Started

[Request an IEEE Account](#)  
(Skip if you have one)

[Create Your Expense Reimbursement Account](#)

##### Step 2: Access

[Log In](#)  
(May require IEEE Network login)

##### Step 3:

[Download the App](#)



# IEEE Corporate Activities



# Submitting a Claim for Reimbursement

Finance | Legal | Contacts & Rosters | News

/ Home / Resources / Travel, Medical and Insurance / IEEE Expense Report

Log in to NextGen with your IEEE credentials

Be sure to log in via [ieee.org/expense](https://www.ieee.org/expense), not the Concur website

## IEEE Expense Report

### NextGen Expense Reimbursement

[View a recorded DEMO featuring Concur's New User Interface which launched on September 26, 2022.](#)

[Slide Deck of Concur's New User Interface \(PPTX, 5 MB\)](#)

Please note: the system's functionality did not change, however, you may notice some visual changes which we cover in the both the recording and slides posted above. Any questions, please send an email to: [NextGenExpense@ieee.org](mailto:NextGenExpense@ieee.org)

The NextGen Expense Reimbursement tool is an automated platform that is designed to be fast, easy, and efficient. IEEE volunteers will save time with a streamlined experience, with IEEE directly reimbursing you. Plus, you can use the [mobile app](#) for easy on-the-go expense reporting.

NextGen Expense Reimbursement is part of the IEEE NextGen platform. [Learn more.](#)

#### Important:

The NextGen Expense Reimbursement tool uses a single sign-on process for logging in through [ieee.org/expense](https://www.ieee.org/expense), not [concur.com](https://www.concur.com).

All users will need an [IEEE account](#) (IEEE username and password) to access the platform.

### NextGen Expense Reimbursement Checklist

Do you need assistance? [Refer to this checklist](#) (PDF, 233 KB) for help

#### Access

##### Step 1: How to Get Started

[Request an IEEE Account](#)  
(Skip if you have one)

[Create Your Expense Reimbursement Account](#)

##### Step 2: Access

[Log In](#)  
(May require IEEE Network login)

##### Step 3:

[Download the App](#)





+

Start a Claim

+

Enter  
Reservation

+

Upload  
receipts

00

Required  
Approvals

00

Available  
Expenses

00

Open Claims

## MY TRIPS (0)



You currently have no upcoming trips.

## COMPANY NOTES

[IEEE User Documentation - Volunteers](#)[IEEE User Documentation - Volunteers](#)

For additional information on FAQs, training, Expense Report Purpose (ERP) selection, check list, etc. please click on the link below.

[NextGen Expense Volunteer Documentation](#)

## MY TASKS

00

Required Approvals →

Great! You currently have no approvals.



00

Available Expenses →

You currently have no available expenses.



00

Open Claims →

You currently have no open claims.



1

\* Required field

Report Name \*  Report Date \*  Expense Report Purpose Level 1 \*

Expense Report Purpose Level 2 \*  Expense Report Purpose Level 3 \*  Expense Report Purpose Level 4 \*

Comment

Please state the name of the event, date it was held, vTools link, and other relevant information

2

- This field is missing required information.
- 000 Advertising Expense - IEEE (4.30.000)
  - 000 Advertising Expense - Non-IEEE (4.40.000)
  - 000 Bank Account Transfers (outgoing) (6.95.000)
  - 000 Chapter & Affinity Group Support (4.15.000)
  - 000 Conference Expenses (4.50.000)
  - 000 Depreciation on Furn& Eqp (5.57.000)
  - 000 Educational Activities (4.60.000)
  - 000 Fundraising (6.30.000)
  - 000 Grants & Awards (4.85.000)

3

Cancel

Create Claim

Sample Claim \$

Not Submitted | Report Num

Claim Details | Print/Share

Add Expense

Edit

Delete Claim

Submit Claim

View: Standard

### Add Expense



0

Available Expenses

+

Create New Expense

Search for an expense type

Recently Used

Taxi, Bus, Uber, etc.

Airfare

Hotel

Miscellaneous

Printing

01. Travel Expenses

Select the expense type for each receipt

Manage Expenses

# Office Supplies \$25.00

01/01/2023

Cancel Delete Expense **Save Expense**

3

Details **Itemisations**

2

Hide Receipt

1

\* Required field

Expense Type \*  
Office Supplies

Transaction Date \*  
01/01/2023

Enter Vendor Name

City of Purchase  
Payment Type \*  
Out of Pocket

Amount \*  
25.00

Currency \*  
Canada, Dollar

Tax Posted Amount  
Receipt Status \*  
Receipt

Personal Expense (do not reimburse)

**Add Receipt**

Click here or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

Expense Report Purpose Level 1 \* 1  
Sections

Expense Report Purpose Level 3 \* 3  
Toronto Section (R70025)

Expense Report Purpose Level 2 \* 2  
Canada - Region 7

Expense Report Purpose Level 4 \* 4  
000 Other (6.20.000)





# If itemisations are needed...

## Office Supplies \$25.00

01/01/2023

Cancel

Delete Expense

Save Expense

3

Ensure that items total to the expense amount, i.e. Remaining = \$0.00

Details

Itemisations

Hide Receipt

Amount  
\$25.00Itemised  
\$25.00✔ Remaining  
\$0.00

2

1

Add Itemisation

More Actions ▾

<input type="checkbox"/>	Date	Expense Type	Requested
<input type="checkbox"/>	01/01/2023	Office Supplies	\$15.00
<input type="checkbox"/>	01/01/2023	Printing	\$10.00



Add Receipt

Click here or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.





## Manage Expenses

## Sample Claim \$25.00

Delete Claim

Copy Claim

Submit Claim

Not Submitted | Report Number: Y1921U

3

Claim Details  Print/Share  Manage Receipts 

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to View: Standard Receipt Payment Type Expense Type Supplier Details Date Requested 

Out of Pocket

Office Supplies

01/01/2023

\$25.00  
Itemised

\$25.00

1

Check that your receipts  
are complete

# Depositing Money into the IEEE Toronto Account

## Option 1: IEEE Internal Transfer (Central Banking)

- Provide the OU ID: Toronto Section #R70025
- Provide the CB Account No.: #700004

## Option 2: By Cheque

- Pay to “IEEE Canada - Toronto Section”
- Email [mengqiw@ieee.org](mailto:mengqiw@ieee.org) for the mailing address

## Option 3: Wire Transfer (including international IEEE transfers)

- Email [mengqiw@ieee.org](mailto:mengqiw@ieee.org) for detail wire transfer instructions