

How do I expense with IEEE Expense (concur)?

A guide for Toronto Section Members

Step 0 - Make sure you have a valid, approved expense

Before you start the expense report, you should make sure you have a valid and approved expense.

IEEE expense guidelines: <https://www.ieee.ca/wp-content/uploads/2024-Expense-Claim-Guidelines-V1.pdf>

For Toronto section activities, amounts of up to \$250 CAD are auto approved, given that a form is submitted here BEFORE the event: <https://forms.gle/aQgazPeGicg68D23A>

If you're unsure about a particular expense or need to request for a larger budget, please contact section officers.

Contact information: <https://www.ieeetoronto.ca/people/>

Step 1a - Create your IEEE Expense Account

Visit <https://ieee.org/expenses>, follow on page instructions to create an account. This may take a day or two.

NextGen Expense Reimbursement (Concur)

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, not 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)

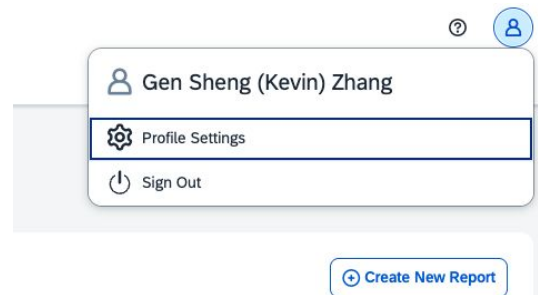
Step 3:

Download the App

Step 1b - Enter your banking information

After getting your account set up, log in and go to profile settings. Then bank information.

Enter your direct deposit bank account information for expense reimbursement.



You hereby (1) authorize direct deposit into your bank account for funds due to you from your employer using electronic funds transfer (EFT) payment services provided by Worldline or any of its affiliates ([Privacy Statement](#)), (2) represent that the information that you enter is accurate and complete in all respects, and (3) agree that you are solely responsible for ensuring that all such information remains accurate and complete in all respects.

An illustration of a check form. At the top right, it says '001'. The form has several fields: 'YOUR NAME' with '123 ANY STREET' and 'YOUR TOWN, PROVINCE M4P 1V5' below it; a 'DATE' field with a calendar icon; a 'PAY TO THE ORDER OF' field; a '\$' field with a '100 DOLLARS' label; 'YOUR FINANCIAL INSTITUTION' with '456 MAIN STREET' and 'YOUR TOWN, PROVINCE T1L 1L1' below it; a 'MEMO' field; and a MICR line at the bottom with the text '1100 11 123456789 123456789'.

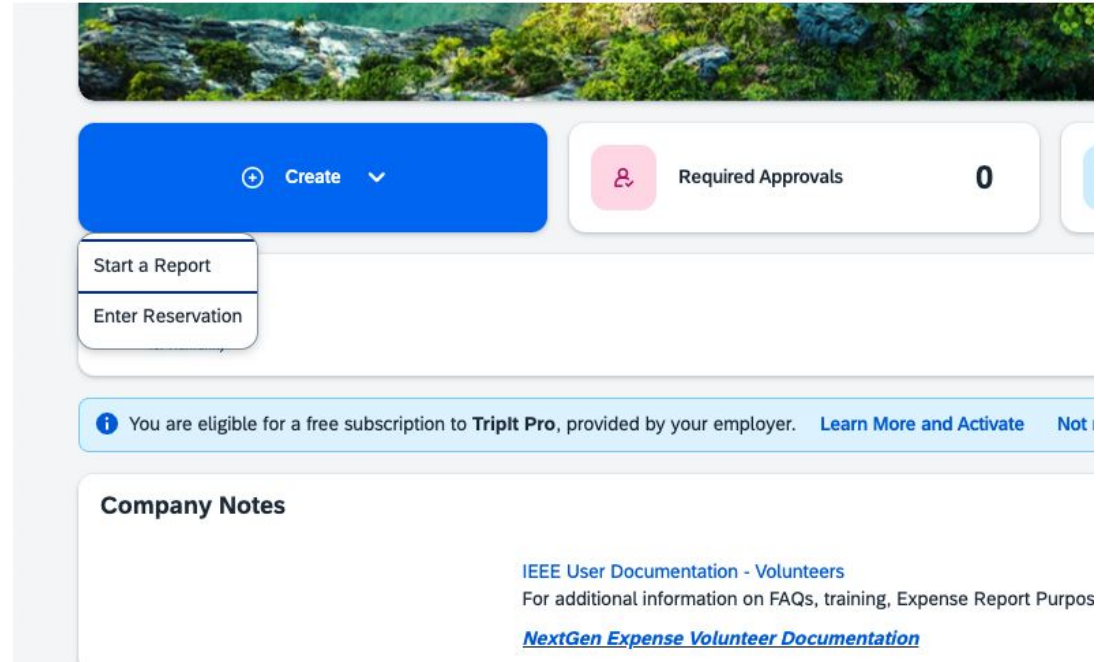
Branch Number : Enter the five-digit Branch Number (shown as 12345 in the illustration).

Institution Number : Enter the three-digit Institution Number (shown as 678 in the illustration).

Account Number is usually located before the **||** symbol on your cheque and is 3-12 numbers or letters.

Step 2 - Create a new expense

After signing into <https://ieee.org/expenses>, and hit the create button to start a new expense. On the drop down, select start a report.



Step 3 - Fill in Report Details

In the report form, use an appropriate title that includes the name of the event/activity, the date, and the settings shown in the screenshot for the purpose levels.

Generally,

1. *Sections* for L1
2. *Region 7 - Canada* for L2
3. *Toronto Section* for L3.
4. L4, it depends on the event or activity, typically *section meeting*, *chapter meeting*, *subsection meeting*, *student activities*, etc.

Remember, this is NOT about the purpose of the expense, but the event/activity the expenses were supporting.

Create New Report

Report Name * Expense For Spring Social 2025 Report Date * 04/19/2025 Expense Report Purpose Level 1 * 1 Sections Expense Report Purpose Level 2 * 2 Region 7 - Canada

Expense Report Purpose Level 3 * 3 Toronto Section (R70025) Expense Report Purpose Level 4 * 4 Section Meeting (4.10.1)

Comment 90/500

This is the expense report for the spring social hosted at XXXX, for all section members.

Create Report Cancel

Step 4 - Create new Expense in Report

After clicking create report, you can add expenses.

You can use the receipt upload + autofill, or just manually create a new expense.

When you create a new expense, you will be asked about the type of the expense, this is where you find the category for the purpose of the expense, such as meals, travel, etc.

Step 5 - Fill in Expense Details

Now, we need to fill all the details regarding the expense. This includes the transaction date, amount, attendees (depending on category of expense), comments, etc.

All expenses should have a comment.

All expenses should also have a receipt, upload the image/pdf on the right side. If a receipt is missing, you must fill in a missing receipt declaration (next slide)

For expenses where the receipt doesn't clearly show itemization, you must fill in the itemizations tab.

The screenshot displays the 'Expense Details' form, which is divided into two tabs: 'Details' and 'Itemizations'. The 'Details' tab is active and contains the following fields:

- Expense Type ***: Meals with Guests (dropdown menu)
- Transaction Date ***: 04/08/2025 (calendar icon)
- City of Purchase**: Toronto, Ontario (dropdown menu)
- Amount ***: 12.23
- Enter Vendor Name ***: Amazon
- Payment Type ***: Out of Pocket (dropdown menu)
- Currency ***: Canada, Dollar (CAD) (dropdown menu)
- Receipt Status ***: Receipt (dropdown menu)
- Calculate Tax**: button

The 'Itemizations' tab is currently empty and shows the following fields:

- CB Account #**: (700004) 700004 (Toronto Section)
- Comment**: This expense is for cups purchased for drinks at the social

Step 5a - Missing receipts

For missing receipts, create the expense without uploading a receipt, and then click the attach receipt button on the expense row missing a receipt. Then click the missing receipt declaration to fill it in.

Note - it is at the discretion of IEEE auditors regarding whether or not a missing receipt expense can be reimbursed.

Attach Receipt

Select a receipt image or reuse one from this report: Don't have a receipt? You'll need to create a missing receipt declaration.

[Missing Receipt Declaration](#)

[Available Receipts](#)[Receipts in Report](#)

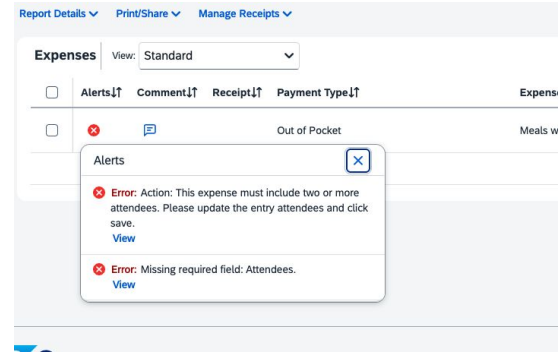
Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

[Upload New Receipt](#)

Step 6 - Fix errors and submit report

Finally, after all expenses have been added, you can submit the report.

If there are any errors or alerts, please resolve them before submitting.



Expense For Spring Social 2025 \$12.23

Submit ReportCopy ReportDelete Report

Not Submitted | Report Number: 1P7LFR

Report DetailsPrint/ShareManage ReceiptsView Available Receipts

ExpensesView: StandardAdd ExpenseEditDeleteCopyAllocateCombine ExpensesMove

	Alerts	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
☐				Out of Pocket	Meals with Guests	Amazon Toronto, Ontario	04/08/2025	\$12.23	...
								\$12.23	

Step 7 - Wait for expense approval + reimbursement

After a report is submitted, it will go through 2 stages of approval, by the section treasurer and an IEEE global approver.

This process may take up to 2 weeks. Please wait patiently and check for the latest status updates on the IEEE expenses website.

After approval, the funds will be deposited into your bank account within a few business days.