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

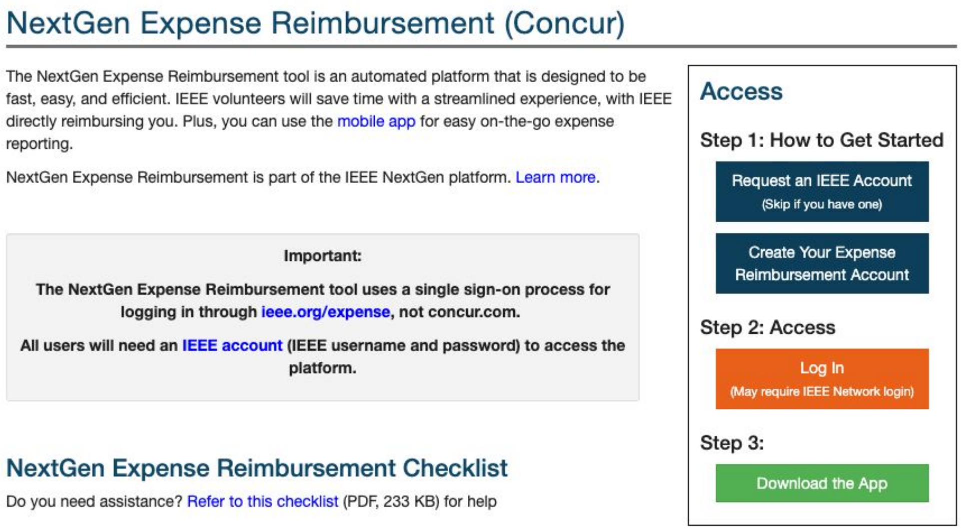
For Toronto section activities, amounts of up to $250 CAD are auto approved, given that a form is submitted here BEFORE the event: **https://forms.gle/aQgazPeGicg68D23A**

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

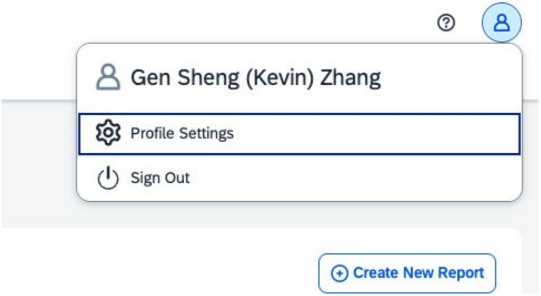
Visit https://ieee.org/expenses, follow on page instructions to create an account. This may take a day or two.

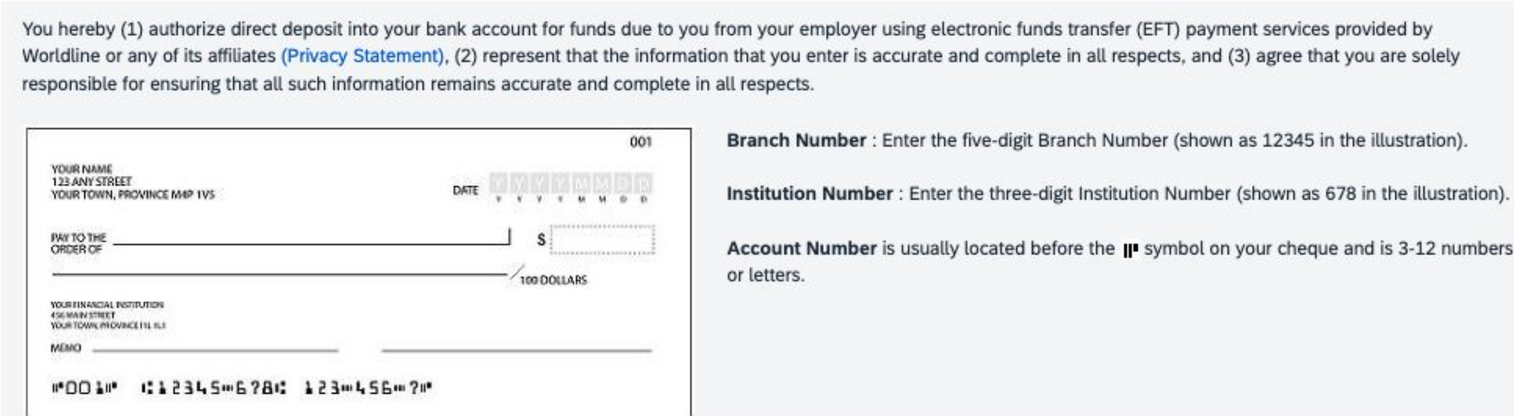


Step 1b - Enter your banking information

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

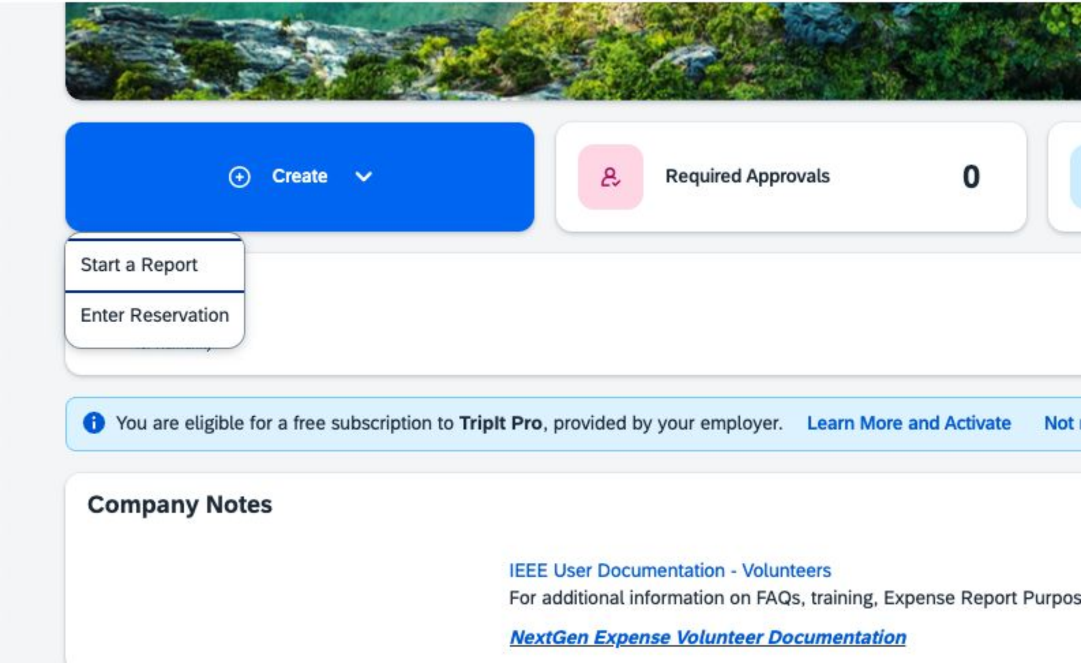
Enter your direct deposit bank account information for expense reimbursement.





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.



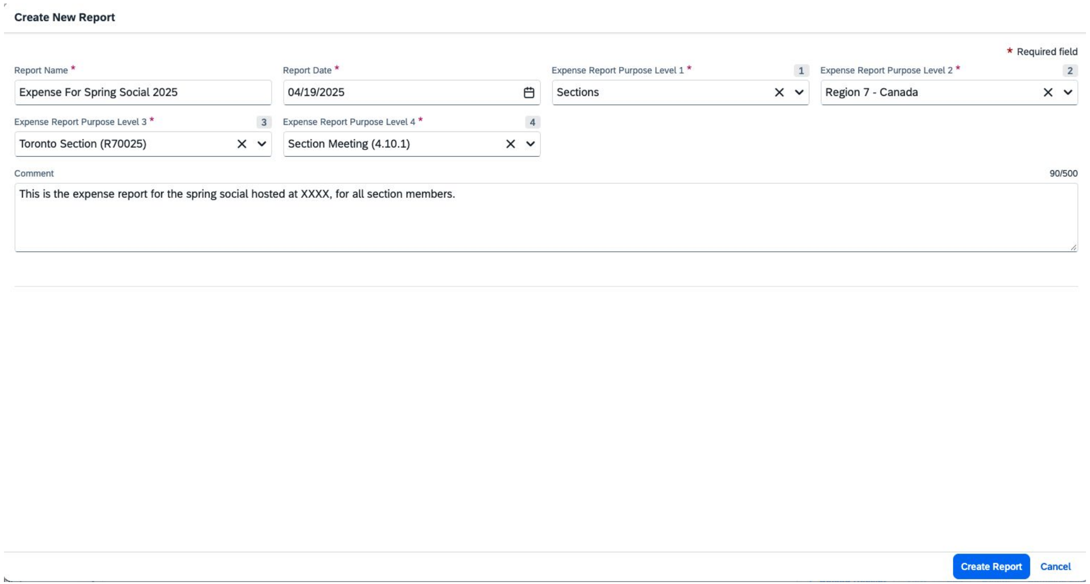
Step 3 - Fill in Report Details

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. T*oronto 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.

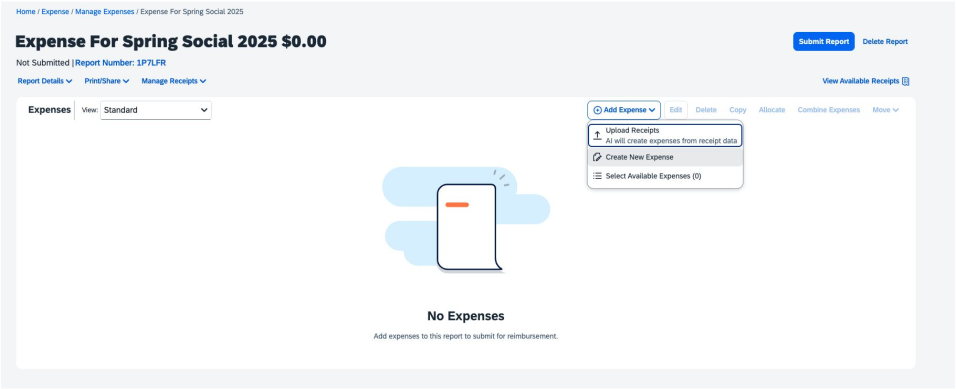


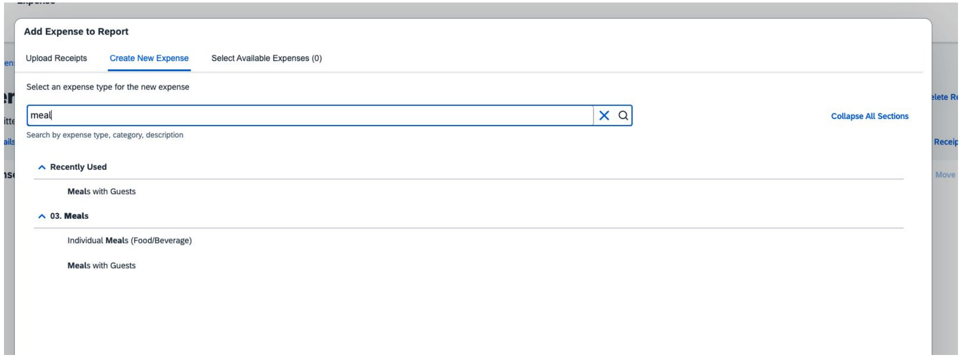
Step 4 - Create new Expense in Report

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.





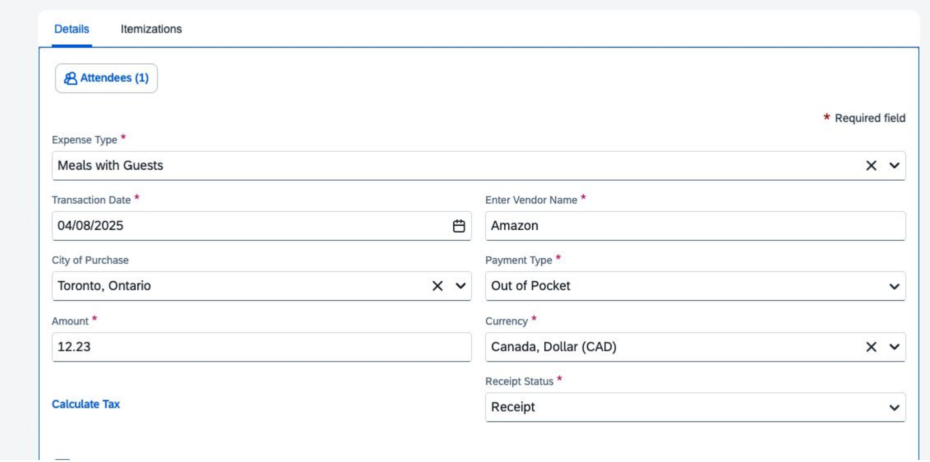
Step 5 - Fill in Expense Details

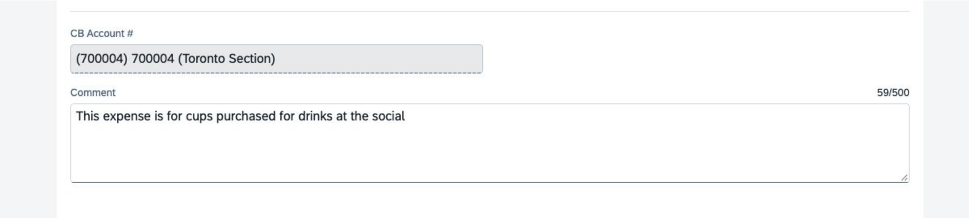
Now, we need to fill all the details regarding the expense. This includes the transaction date, amount, attendees (depending on category of expense), comments, etc.

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.

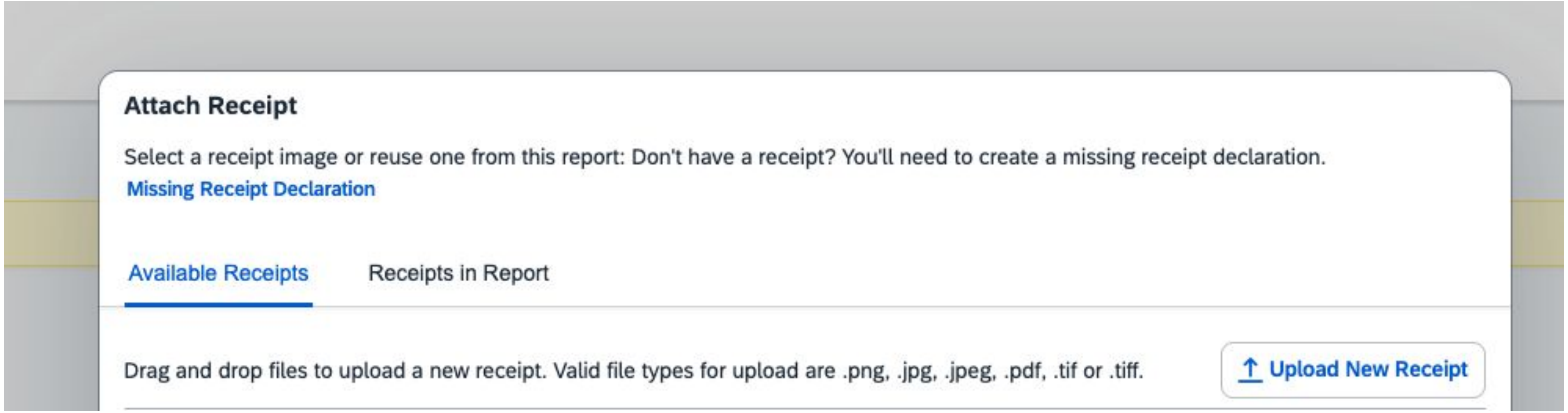




Step 5a - Missing receipts

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.

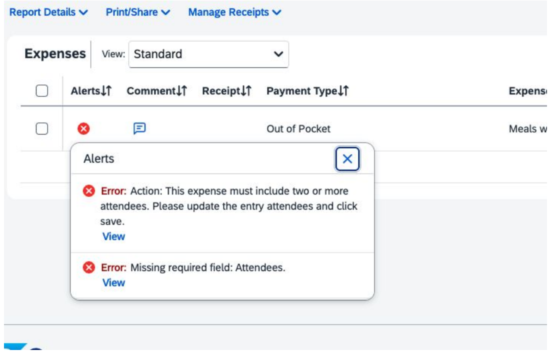
Note - it is at the discretion of IEEE auditors regarding whether or not a missing receipt expense can be reimbursed.

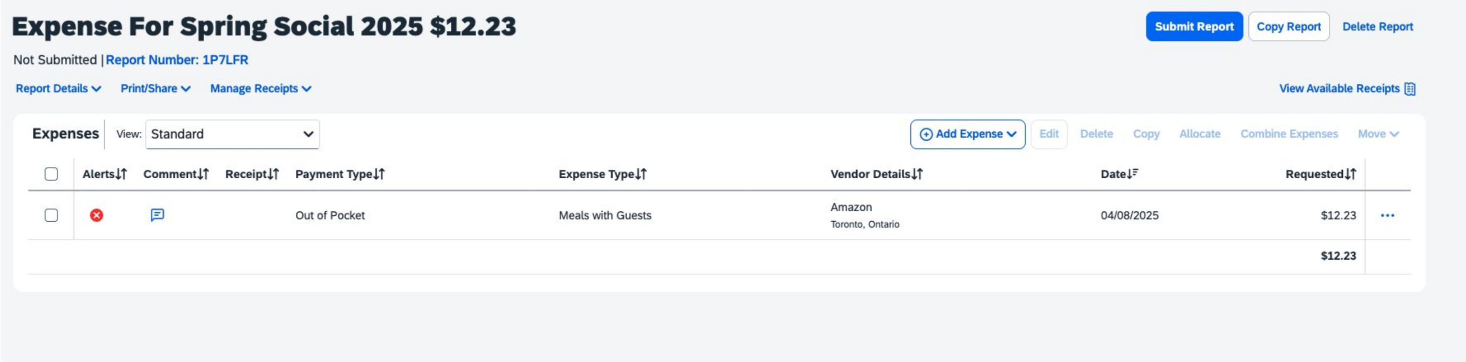


Step 6 - Fix errors and submit report

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

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





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.