

# 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/UuxbnQM8ZR9kxtkUA>

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://iee.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 [iee.org/expense](https://iee.org/expense), not [concur.com](https://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)

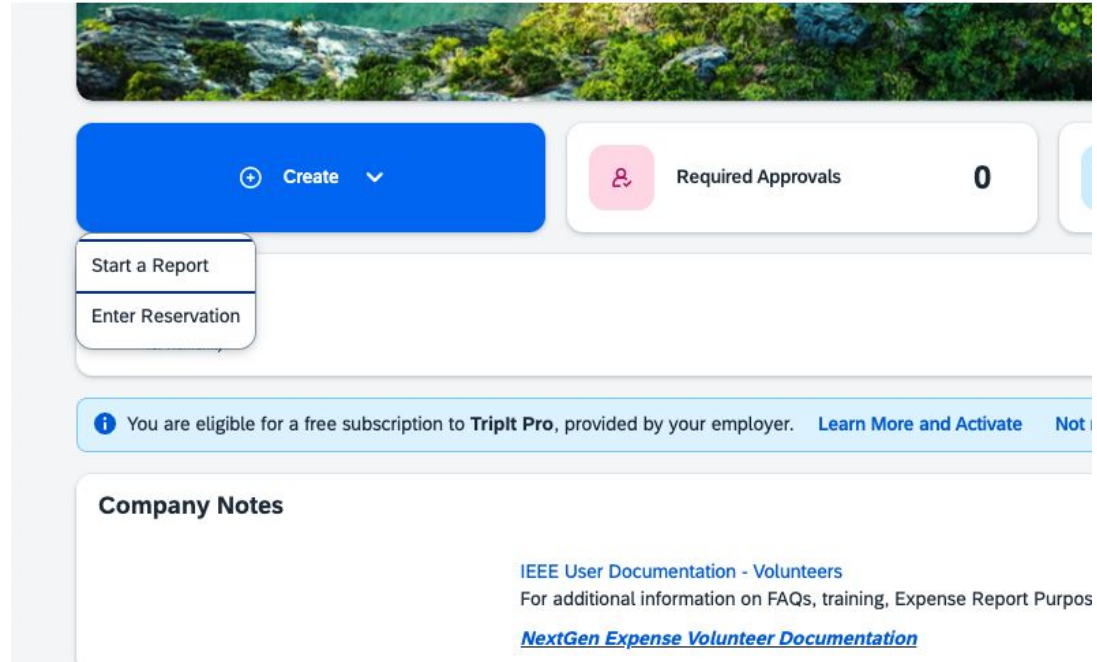
#### Step 3:

Download the App



## Step 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.



The screenshot displays the IEEE expense reporting interface. At the top, there is a blue button labeled "Create" with a plus icon and a dropdown arrow. Below this button, a dropdown menu is open, showing two options: "Start a Report" and "Enter Reservation". To the right of the "Create" button, there is a pink button labeled "Required Approvals" with a person icon and the number "0". Below these elements, there is a light blue banner with an information icon and the text: "You are eligible for a free subscription to TripIt Pro, provided by your employer. [Learn More and Activate](#) Not". At the bottom, there is a section titled "Company Notes" with two links: "IEEE User Documentation - Volunteers" and "NextGen Expense Volunteer Documentation".

# 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.

The screenshot shows a 'Create New Report' form with the following fields and values:

- Report Name \***: Expense For Spring Social 2025
- Report Date \***: 04/19/2025
- Expense Report Purpose Level 1 \***: Sections
- Expense Report Purpose Level 2 \***: Region 7 - Canada
- Expense Report Purpose Level 3 \***: Toronto Section (R70025)
- Expense Report Purpose Level 4 \***: Section Meeting (4.10.1)
- Comment**: This is the expense report for the spring social hosted at XXXX, for all section members.

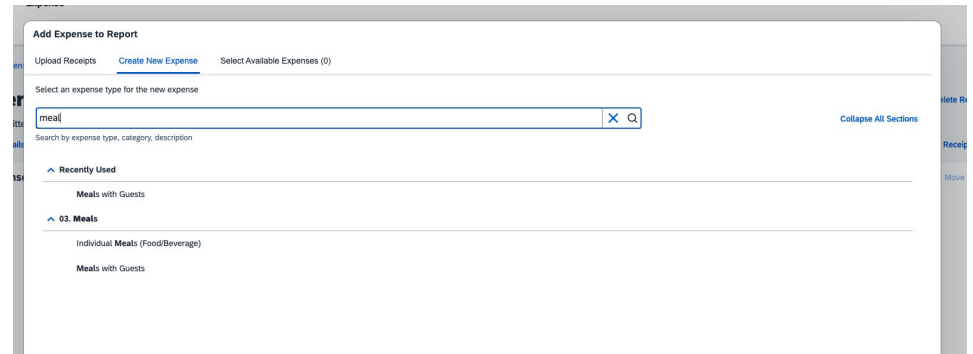
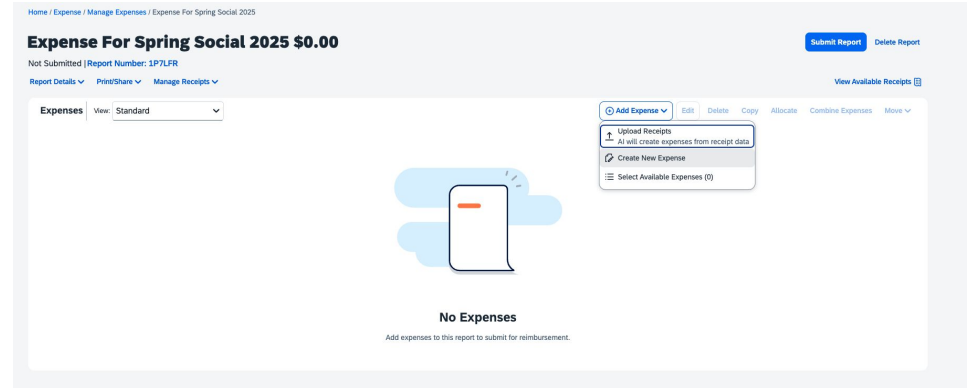
At the bottom right of the form, there are two buttons: 'Create Report' (highlighted in blue) and 'Cancel'.

# 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.

Details Itemizations

Attendees (1)

Expense Type \* \* Required field

Meals with Guests X v

Transaction Date \* 📅

04/08/2025

Enter Vendor Name \*

Amazon

City of Purchase

Toronto, Ontario X v

Payment Type \*

Out of Pocket v

Amount \*

12.23

Currency \*

Canada, Dollar (CAD) X v

Calculate Tax

Receipt Status \*

Receipt v

CB Account #

(700004) 700004 (Toronto Section)

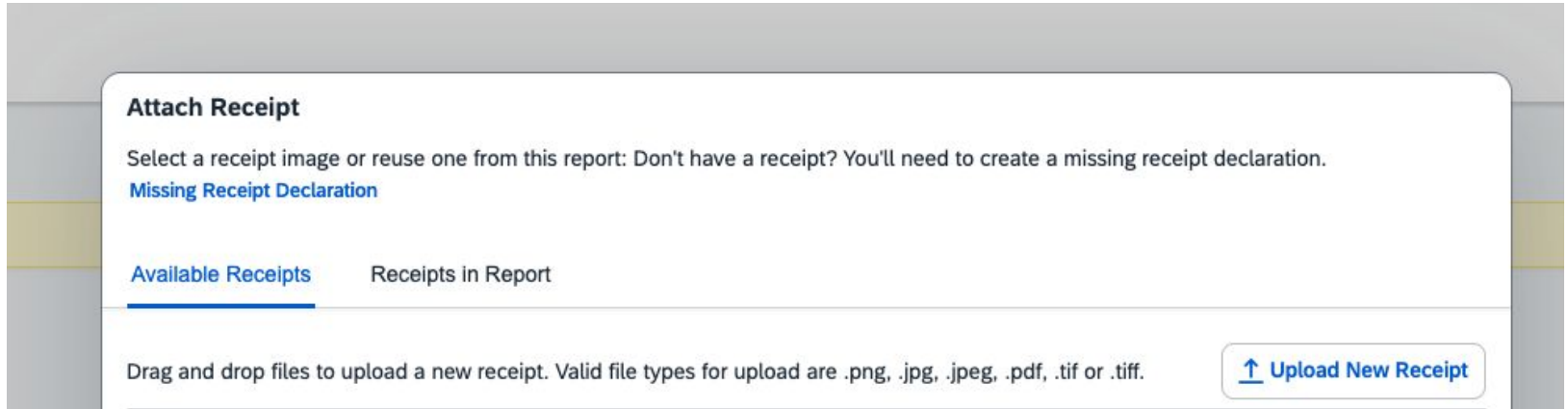
Comment 59/500

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

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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.

Report Details ▾ Print/Share ▾ Manage Receipts ▾

Expenses View: Standard ▾

<input type="checkbox"/>	Alerts↑	Comment↑	Receipt↑	Payment Type↑	Expense
<input type="checkbox"/>	✖	💬		Out of Pocket	Meals w

Alerts

✖ Error: Action: This expense must include two or more attendees. Please update the entry attendees and click save. [View](#)

✖ Error: Missing required field: Attendees. [View](#)

## Expense For Spring Social 2025 \$12.23

Not Submitted | Report Number: 1P7LFR

Report Details ▾ Print/Share ▾ Manage Receipts ▾

[View Available Receipts](#)

[Submit Report](#)

[Copy Report](#)

[Delete Report](#)

Expenses

View: Standard ▾

[Add Expense](#)

[Edit](#)

[Delete](#)

[Copy](#)

[Allocate](#)

[Combine Expenses](#)

[Move](#)

<input type="checkbox"/>	Alerts↑	Comment↑	Receipt↑	Payment Type↑	Expense Type↑	Vendor Details↑	Date↑	Requested↑	
<input type="checkbox"/>	✖	💬		Out of Pocket	Meals with Guests	Amazon Toronto, Ontario	04/08/2025	\$12.23	⋮
								<b>\$12.23</b>	

# 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.