IEEE Nanotechnology Council (NTC)
Volunteer Travel Authorization and Reimbursement Policy
Effective January 17, 2023; rev. 4/22/24

The policy is based on three governing principles:

1. Volunteers are entitled to reimbursement for reasonable and pre-approved expenses incurred while conducting NTC business.
2. Expenses must be "reasonable and customary," recognizing the need for fiscal responsibility and the NTC's limited financial resources, and
3. The policy must be consistent with IEEE's policies. Links to relevant sections of two of IEEE's policy documents can be found here: https://www.ieee.org/content/dam/ieee-org/ieee/web/org/travel-expense-reimbursement-guidelines.pdf

In most cases, "pre-approved" is implied by the responsibilities of the volunteer, most of whom will fall into one of the categories below:

1. APPROVED TRAVEL
   a. Executive Committee Officers to the annual Executive and Administrative Committee meeting usually held at the beginning of NANO conference in July:
   President, Past-President, President-Elect, Secretary, VP for Publication, VP for Technical Activities, VP for Conferences, VP for Finance, VP for Education
   b. The President and President-Elect to appropriate TAB meetings
   c. The Council Vice-Presidents
      i. VP Finance - IEEE Treasurer's Workshop
      ii. VP Conferences – IEEE CONVENE
      iii. VP Publication – IEEE Panel of Editors Meeting and PRAC Reviews of majority-sponsored NTC publications
   d. Editors-in Chief to the IEEE Panel of Editors Meeting and to the PRAC Review for the journals of which they are EiC.

2. TRAVEL THAT REQUIRES PRE-APPROVAL
   a. **Distinguished Lecturers Travel:** The Distinguished Lecturer (DL) program is budgeted to cover reasonable reimbursable expenses between the traveler's home and the destination city, with each DL subject to an annual maximum. All expenses must be pre-approved and subsequently verified by the VP for Education and VP for Finance. Travel reimbursement for a single trip is generally limited to $1500 USD. Funds for the program are limited, and speakers are encouraged to couple travel with other meetings or multiple speaking engagements.

b. **Ad hoc Committee Chairs:** Certain members may be appointed by the NTC ExCom or the President to fulfill some specific mandated function, e.g. currently the Chairs of standing committees such as WIE, Standards, and Chapters. Travel for these functions are separately budgeted; however, all expenses must be pre-approved by the NTC President, and by VP of Finance for funds availability.

c. **Members of Publication (EiCs), Technical Activities (TC chairs), Conference (conference chairs), Finance (members of Finance Committee), Education division** may be approved for travel support when traveling for NTC related business. For example: IEEE meetings/workshops for conference organizers, EiCs meetings, Technical Activities and/or financial workshops. Such expenses are yearly budgeted for each division separately and all expenses must be pre-approved and subsequently verified/approved by the responsible VP in consultation with the VP Finance for availability of funds.

d. **NTC Coordinated Programs/initiatives (under 3% and 50% rules funding):** Volunteers involved in different NTC initiatives/programs are eligible for reimbursement. Some limitations in the expenses might be imposed depending on the budget allocated to the program/initiative. The expenses must be pre-approved and subsequently verified by the program/initiative coordinator in consultation with the VP Finance for availability of funds.

3. ADDITIONAL GUIDLINESS FOR TRAVEL

Requests for reimbursement by the Council for all other travel must be pre-approved by the Council President and VP of Finance (Financial Activities) prior to the travel.

Conference Chairs: The NTC does not support conference administration travel directly, but Conference Chair travel, for example, to report at the annual ExCom/AdCom meetings or to present conference information at the previous year's conference are valid conference expenses.

The NTC does not cover AdCom member expenses. Some member societies may cover their AdCom representative's expenses when traveling to the NTC AdCom meeting.

The Finance VP reviews and approves all reimbursement requests submitted to Concur.

General Comments:
a. In practical terms, volunteers are expected to be frugal with NTC funds, seeking out economical prices for airfares and hotels. For example: For attendance at the ExCom/AdCom meetings, the negotiated NANO conference hotel rate (if there is one) is the maximum allowable, and volunteers should be aware of cut-off dates. Similarly, airfares (basic economy coach only) are usually cheaper when purchased well in advance.
b. **Air travel:** In all cases, the NTC will only refund airfare in basic economy. However, if requested in advance, some upgrades can be approved. Please see the table below. Also, the NTC will refund reasonable expenses as related to hotel (due to stranded conditions) as well as fees due to luggage charges, and early booking.
c. In general, hotel expenses are reimbursable for one night before and one night after the applicable NTC function.

4. TRAVEL ADVANCES AND REIMBURSEMENTS

The traveler submits only one expense report for each trip unless the trip is sponsored by different IEEE OUs.

4.1 Admissible Expenses

IEEE policy provides for reimbursement for those individuals authorized to attend specific meetings only. The specific meeting authorized to attend, or the purpose of the travel must be indicated for each day. In instances where an individual will have a reasonable separation between meetings and it is not economical or possible to depart and return later in the week, expenses for meals and lodging actually incurred will be reimbursed. It is the policy of the Council to reimburse meals and lodging for the night before, nights during, and the night after the approved meeting(s).

4.1.a Transport

Air travel	Airfare is reimbursed when it is the most economical form of transportation. In all cases, the NTC will only refund airfare in basic economy; however, if requested in advance, trips with air segments longer than 7 hours (such intercontinental flights) and/or to accommodate medical conditions of the passenger (provide medical certificate) may qualify for an upgrade. The approval is still contingent upon availability of funds as initially allocated to the activity of the volunteer in the NTC budget. Fees for seat selection and luggage are reimbursable. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.) You can find the most recent updates to the current IEEE air travel policy below*. A link to the IEEE Expense Reimbursement Guidelines for IEEE Volunteers can also be found in the <u>IEEE Finance Operations Manual (FOM)</u>, page 23.
Train Travel	Train travel should be at economy/coach rate. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.)
Car Rentals	Car rentals should only be undertaken when alternate economic public transportation is unavailable or impractical. (Public transportation includes taxis, buses or airport limousines.) Individuals are reminded to use the IEEE identification number to obtain proper discounts. Original receipts must be obtained and attached for all such expenses. (An itinerary invoice showing the fare is not a valid receipt.) You can find more information about car rentals below. **
Tolls and Parking	Reasonable expenses are reimbursed for costs incurred for tolls or parking with the use of personal or rented automobiles while on authorized Council travel.

Mileage (when using personal car)	The IEEE approved rate of reimbursement will be used for the actual mileage incurred while on Council authorized travel. The number of miles/kilometers driven must be recorded and documented with an image of a map showing mileage. This rate is computed within SAP Concur.
Taxi/Bus	Details of each taxi fare must be itemized on your Concur report. A receipt is required for all taxi, bus or airport shuttle (over $25) expenses.
Covid testing	Fees associated with Covid testing are reimbursable.
Travel Insurance	Travel insurance for trip cancellation or lost baggage is permitted. .
Travel Insurance for medical coverage	Travel insurance for medical coverage is not reimbursable. Hybrid travel insurance policies that include any type of medical coverage will not be reimbursed
Travel Accident Medical Plan	A section for "Volunteer Global Travel Accident Medical Plan" which provides travel assistance services to IEEE volunteers, has been added to the IEEE travel policy.

* Airfare – "all classes of Economy airfare are accepted" has been replaced with "non-refundable Economy class is standard for IEEE business travel". Economy class is defined as the basic coach fare, which is the lowest fare offered by the airline. Economy class tickets that include an assigned seat and one checked bag are reimbursable. The lowest fare in economy class that allows for seat choice, carry-on bag free and 1st checked bag: for a nominal fee is referred to, in this document, as basic economy."

Upgrades such as extra leg room, priority boarding, Premium Economy, Economy Plus, etc. are permissible if pre-approved by organizational unit leadership (Council President for NTC).

** Car rentals should only be undertaken when alternate economic public transportation is unavailable or impractical. (Public transportation includes taxis, buses or airport limousines.) Individuals are reminded to use the IEEE identification number to obtain proper discounts. IEEE Corporate ID Numbers can be found online here: https://www.ieee.org/about/volunteers/tax-administration/tax-corp-info.html . IEEE's corporate automobile liability insurance policy is extended to include collision and liability coverage on a primary basis for automobiles rented for authorized IEEE business trips. Therefore, when renting automobiles, individuals are advised to not purchase the collision damage waiver/loss damage waiver (CDW/LDW) offered at the time of rental. Some states may require proof of collision/liability insurance coverage. If that is the case, individuals are requested to contact the IEEE Insurance Department to obtain proof of insurance coverage.

4.1.b Lodging and Meals

Lodging	The Council will reimburse single room rates, including taxes and fees. The expense must be recorded daily. The original itemized hotel bill must be attached to the expense report as a receipt. Reimbursement is limited to meeting days, one day before the meeting, and one day after the meeting. Pre-approval for any extended stays must be obtained from the VP Finance

Meals	Details for each personal meal expenditure must be itemized on the expense report form showing the date and the amount. When dining in the hotel where you are staying, it is recommended that you charge your meals to your room to reduce the need for additional receipts.
Guests	Details for each courtesy or entertainment expenditure must be itemized showing the date, amount, name of guest, affiliation, and purpose of the expenditure. Total daily amounts are automatically recorded on the expense report form. This section is only to be used for your guest's meals. Your own portion of the cost should be reported under meals/self.
Phone, Fax, Internet	Telephone, fax, and internet reimbursements are limited to IEEE related business. Calls placed from home telephones or cell phones must have copies of itemized telephone bills attached to be eligible for this reimbursement.
Tips and Gratuities	Reasonable tips and gratuities will be reimbursed. Itemize the tips in the description with a total in the space provided. Use an additional page if required. Tips over $25.00 per day must have a receipt.

* Reasonable food and beverage expense will be reimbursed. Volunteer and staff individual daily meal and beverage expenses are limited to US$100 (this is the upper limit, please try to be significantly below this limit if possible). This is not to be interpreted as a per diem amount; receipts are required for expenditures over US$25.00. Expenses beyond these values require a written explanation on the traveler's expense report.

Other – Any expenses not yet recorded on the expense report will be reported as an "other" expense. Examples might be reasonable and necessary laundry and valet charges, which will be reimbursed after travel of five or more consecutive days if the original receipts are attached. Non-essential expenditures for personal items such as newspapers, movies and entertainment, or any other unnecessary non-travel related items will not be reimbursed.

4.2 Preparing and Submitting the Concur Reimbursement Requests

4.2.1 COMPLETING THE SAP CONCUR EXPENSE REPORT FORM
All expense reports will be submitted via IEEE Concur. To go to Concur, please visit
https://www.concursolutions.com/home.asp , or https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report. You will be asked to fill out a profile which will include how you wish to receive your reimbursement: the options are check by mail, direct deposit, or Western Union if you live in a country where IEEE cannot make a direct deposit. Your profile will also allow selection of the currency used.

Cost Accounts to charge your travel: There are four levels of cost accounts from which to select when filling out your travel expense reports:

Level 1 for us is *Technical Activities - Societies*
Level 2 is Nanotechnology Council
Level 3 will be one of the following, which the traveler will select based upon the purpose of your travel:

- AdCom Meeting – ExCom Travel

- Chapters
- Conference Committee
- Distinguished Lecturers
- Educational Committee Travel
- ExCom Travel
- Finance Committee
- President travel
- Publication Editors Cmte Travel
- Standards
- Technical Committee
- WiE
- Initiatives 3%
- Initiatives 50%

Level 4 should not offer a choice.

The reimbursement currency in your Concur profile, should you select a direct deposit, is based on your country of residence. If you reside in a country where one of the currencies listed below is considered the local currency, you must enter your banking information directly into Concur (select Profile > Profile Settings > Bank information).

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAD)
- Indian rupee (INR)
- Singapore dollar (SGD)

If your currency is NOT one of the five listed above, you will need to complete a one-time enrollment with Western Union to receive electronic reimbursements from IEEE. To enroll, please complete the required registration form. Please enter your 8-digit IEEE member number in the "Payee ID" field.

Concur Training & Tutorial is available at https://www.concurtraining.com/pr, Concur Questions & Feedback should be sent to concurfeedback@ieee.org with copy to Brittian Parkinson, manager@ieee-cas.org.

4.2.2 *Receipts*
Copies of the receipts must be attached to your SAP Concur report. Receipts for any single expenditure more than $25.00 must be provided, and IEEE encourages that all receipts for any amount be submitted.

4.2.3 Approval and Submission of Expense Reports
An electronic copy of the expense report must be completed via SAP Concur. Once the report is submitted, it will be reviewed by the NTC Officer directly responsible and by NTC VP of Finance. Upon the approval, the report will be submitted to IEEE for final review and reimbursement.

4.2.4 Expense Report Timeliness
The IEEE Board has ruled that all expense reports are to be submitted within 60 days of completion of travel, otherwise the expenses may not be reimbursed.

Revision History:
Last Revision: January 2023 / Version #: 3
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