

GLOBAL IEEE INSTITUTE FOR ENGINEERS ('GIEEE')

Unit 501-502, 5th Floor, WTC-Brigade Gateway,
Dr. Rajkumar Road, Malleshwara West, Bengaluru 560055

INDIA IEEE VOLUNTEERS EXPENSE REIMBYRSEMENT POLICY

1. Introduction:

These guidelines outline standard procedures and practices for volunteers (both members and non-members) regarding the incurrence and reimbursement of business-related expenses.

This will enable a consistent approach for timely processing along with required documentation on authorized expenses. The guidelines are in accordance with the GIEEE's Internal and Statutory Audit requirements.

Volunteers are requested to exercise judgment, bearing in mind both economy and practicality, when incurring expenditures and exercise restraint in spending funds.

GIEEE has the right to audit each expense report to ensure appropriate documentation is provided and is in compliance.

GIEEE assumes no obligation to reimburse for expenses that are not in compliance with these guidelines. Expense reports submitted without the necessary supporting documentation will be rejected.

Tax rules or audit requirements may occasionally require changes in definition or documentation requirements.

2. Expense Report Submissions:

2.1. There are two ways to submit the reimbursement statements –

- 2.1.1. Through CONCUR – if the business expense is not directly related to India Sections/Council Operations and spendings are in foreign currency
- 2.1.2. Through GIEEE – if the business expense is related to India Sections/Council Operations and spendings are in INR

2.2. Concur Process:

The 'Concur' is the primary tool used to create and submit expense reports, in accordance with the implementation timeline. The following dedicated webpage houses the NextGen Expense (Concur) account creation/login instructions and implementation timeline for IEEE volunteers. Training, FAQ's,

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and other pertinent information regarding Concur are also available in the link below.

<https://corporate.ieee.org/resources/travel,-medical-and-insurance/ieee-expense-report>

All expense reports processed in NextGen Expense will be reimbursed electronically to the volunteer's bank account.

2.3. GIEEE Process:

2.3.1. Currently it is manual process

2.3.2. 'Volunteer Expense Reimbursement Statement' template available in this link -

https://drive.google.com/drive/folders/1UWc9StLwODVLnHVOI_5gMZYZWdfZv46h

2.3.3. Reimbursement is against the expenses incurred within Indian territory. Reimbursement is only for INR invoices and support documents.

2.3.4. Expense must be approved by the concerned Section Chair / Council Chair

2.3.5. Email approval from Chair will serve the purpose of Audit requirements

2.3.6. Individuals are encouraged to submit no more than one consolidated expense report per month.

2.3.7. Transaction currency is INR and to the bank account within India. (Reimbursement will not be processed in any other currencies and not to any foreign countries)

2.3.8. Reimbursement of business-related expenses will not be processed to any third-party account other than the individual submitting the expense report

2.3.9. Expense reports must be submitted within a reasonable period of time - within 15 days after they were incurred

3. Expense Report Payment Schedule:

3.1. There is a seven (7) business day metric to process an expense report once it is received by the GIEEE. Please note this metric does not include the amount of time it takes to conduct the approval process at GIEEE. If the expense report is not in compliance, GIEEE cannot begin to process reimbursement.

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- 3.2. After all approval requirements have been satisfied and the expense report has been fully audited, payment will be initiated. From this point onwards within 7 working days payment will be deposited into the beneficiary's bank account.
- 3.3. Expense statements should be directed to alias email ID of GIEEE Finance; gieee-finance@ieee.org
- 3.4. The Volunteers shall submit the duly filled 'Volunteer Reimbursement Form' along with the supporting documents to GIEEE Finance team with a copy to Section Chair and Treasurer.
- 3.5. GIEEE Finance team shall vouch the documents shared by Volunteers.
- 3.6. After vouching and if no deviations found, GIEEE Finance team will create the payment in the respective Section's Operations account at SBI Bangalore.
- 3.7. Submitter must be entered the Banking information into the 'Volunteer Expense Reimbursement Statement'
- 3.8. All expense will be reimbursed electronically – NEFT/RTGS/IMPS. No Cheque payments
- 3.9. After the payments are processed, GIEEE Finance team will capture entire transactions into GIEEE Books at NextGen application for auditing, statutory and reporting process. Also, they will co-ordinate with IEEE Finance team on ledgers consolidation

4. Support Documents Requirement:

- 4.1. Invoice/support documents must be submitted for any single expenditure in excess of INR 500. Photocopied documents are not acceptable.
- 4.2. For business travels through flights, boarding pass (original) is mandatory. If it is web check-in, printout of screenshot or softcopy document printout will serve the purpose.
- 4.3. Credit card receipts will not be considered a valid support document.
- 4.4. Invoice/support documents are NOT required for the following:
 - a) Tip payment
 - b) Auto-rickshaw travel (if not booked through any apps)
 - c) Refreshments from local vendors
 - d) Any miscellaneous items costs INR 500 or less. Please note expenses classified as Miscellaneous require a detailed explanation

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5. Expenses allowed for reimbursement:

- 5.1. Airfare cost
- 5.2. Additional expense or penalty for cancellation of air tickets with written explanation of the circumstances.
- 5.3. Lodging expense
- 5.4. Reasonable hotel gratuities
- 5.5. Car Rentals
- 5.6. Toll Fees and Parking Fees related to Car Rentals
- 5.7. Meals & Beverages
- 5.8. Other Ground Transportation expense
- 5.9. Telephone/Internet: Allowed only for specific business travels which are directly related to India Sections/Council activities and reimbursement is properly approved by the Section/Council Chair.
- 5.10. Internet access for IEEE business use
- 5.11. Tips/Gratuities: Reasonable and customary gratuities are based on geographic customs and cultures and will be reimbursed. If gratuities have already been included in the bill or contract, additional tipping will not be reimbursed.

6. Non-Reimbursable Expenses:

- 6.1. GIEEE will reimburse volunteers for all reasonable expenses directly associated with Section/Council activities. Personal expenses that are primarily personal in nature will not be reimbursed. The following is a list of non-reimbursable expenses and is not necessarily all inclusive:
 - Personal expenses of any kind
 - Airline membership clubs, lounges, rewards programs
 - Lost baggage while traveling on business (reimbursement requests should be made directly to the airline or credit card company)
 - Partner/Dependent/Companion travel expense
 - Movies, hotel room movies, pay television fees
 - Hotel "no-show" fees except where extenuating circumstances exist
 - Hotel health clubs, gyms, spas, etc.
 - Membership fees associated with hotel frequent guest programs

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- Cancelling fee against rental car reservations
 - Sundry items
 - Shoeshines
 - Travel insurance (including hybrid policies) that includes any type of medical coverage
 - Dinner shows
 - Parking fine tickets or fines for traffic infractions
 - Plays
 - Sporting events
 - Greens fees, court fees, etc.
 - Costs incurred for personal at-home expenses such as childcare, lawn or home maintenance fees, kennel fees, etc.
 - Personal articles or personal care costs such as clothing, clothing rental, hair dryers, toiletries, medical services, barber and hairdresser fees, etc.
 - Loss or theft of personal property (e.g., clothing, jewelry, etc.).
 - Medical prescriptions are not reimbursable unless they are directly related to business travel
 - Personal credit card fees or any other membership fees associated with credit card maintenance
 - Traffic or parking tickets/fines
 - Partner/dependent/companion travel expenses (exceptions may apply only if proper approval is secured and submitted)
 - Expenses in violation of Indian Laws
 - In general, supplier invoices are not reimbursable. They should not be submitted on an expense report. Supplier invoices should be sent to gieee-finance@ieee.org
- 6.2. Questions regarding the completion of an expense report can be addressed by contacting gieee-finance@ieee.org.
- 6.3. Questions regarding these guidelines should be directed to the respective employee of GIEEE who assigned to manage the respective Sections activities.

NOTES:

1. *These guidelines are as per the Statutory and Audit requirements of GIEEE*
2. *The guidelines/procedures/policy may change at any point of time based on the government norms and GIEEE requirements as well.*

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3. *As and when the changes occur to this guidelines/procedures/policy, GIEEE will update on the same*
4. *GIEEE has the right to audit each expense report to ensure appropriate documents are provided and is in compliance.*
5. *GIEEE assumes no obligation to reimburse for expenses that are not in compliance with these guidelines.*
6. *Expense reports submitted without the necessary supporting documentation will be rejected.*
7. **Reimbursements (in case where Section has to reimburse to the Volunteers) are allowed only against the Section related activities and against the expense incurred within Indian territory - Reimbursement is only for INR invoices and support documents.**
8. *Wherever applicable, Volunteers shall process the reimbursement through CONCUR Process.*
9. *No duplicate/photocopy invoices/support documents are allowed to submit. If done so, reimbursement will not be processed.*