NextGen Expense Reimbursement Tool
Frequently Asked Questions

Getting Started: Register/Account Login/Mobile App

How do I get started?
- 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. Request an IEEE account.
- For registration details, see next question.

How do I register and log in?
Using the NextGen Expense Reimbursement platform is easy.
Start on ieee.org/expense (DO NOT go to concur.com). Note: 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.

- **Step 1: Create Account**
  All users will need an IEEE account (IEEE username and password) to access the platform.
  Request an IEEE account, if you do not already have one.
  Create your expense reimbursement account. You will receive an email with login instructions, within 24-36 hours of creating your account.

- **Step 2: Access Your NextGen Expense Reimbursement Account**
  Use your IEEE account to log in.
  Fill out your profile, including your banking and traveler profile information (where applicable). If your local currency is **not** USD, EUR, CAD, or INR, you will need to create a Western Union profile for reimbursement in your local currency.

- **Step 3: Download the App**
  Download the mobile app. To sign into the mobile app, use the code **EDDB6G** to enable single sign-on.

If I already use SAP Concur through another company or institution, can I use the same login user ID?
No. Every company or institution's use of SAP Concur is independent from one another. To register and log in, please follow the instructions in the answer to the preceding question.

How do I get the mobile app and sign in?
You can download the mobile app:
- · For Apple users
- · For Android users

To sign into the mobile app, use the code **EDDB6G** to enable single sign-on (watch video).

Where do I get help logging into the system?
Volunteers may reach out to IEEE's project team at nextgenexpense@ieee.org for general assistance or questions.

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Does anything change with my Concentration Banking (CB) Card?
No, there is no process change when using a CB card.

Do I enter my banking information in Concur or Western Union?
The reimbursement currency in your NextGen Expense Reimbursement profile 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)

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

Questions regarding the Western Union registration process can be forwarded to Western Union by email at epayvendormanagement@westernunion.com or by phone at +1 800 815 2460 option 1. For all other general inquiries, please continue to contact the IEEE project team at nextgenexpense@ieee.org.

Can I delegate the submitting of an expense report to someone else, such as a person on my staff or an IEEE staff member?
Yes, details on how to designate as a "Delegate" are available in training materials. Note: Individuals who approve expense reports also may identify "Approval Delegates" to serve as a backup when the customary approver is out.

What is the "Expense Report Purpose (ERP)" field?
The Expense Report Purpose (ERP) field automatically drives the General Ledger (GL) coding and approvals; you cannot edit the GL code in the system. Your dedicated IEEE staff support provides ERP information. Or, you may refer to the ERP library. Note also that an expense report can have multiple expense report purposes; each line can be different.

How will I get reimbursed for my expenses?
You'll be reimbursed electronically. Each user will be responsible for maintaining their own banking information within their user profile.

Will my expense reimbursement be made in my country's currency?
Yes, all electronic payments processed through NextGen Expense Reimbursement will be made in the local currency, based on the country of residence in each user's personal profile.

What if I do not want to provide my financial information?
The only way to be reimbursed is electronically, and your bank information will need to be entered in your profile (for some countries it will be a Western Union profile). If you do not provide the banking information, the payment cannot be processed. Personal information entered in the profile is secure and can only be managed and viewable by the user.

How do I enter transactions in a foreign currency?
When entering transactions in a foreign currency, use the currency that is shown on the receipt. Concur converts transactions to your local currency and reimbursements will be made in your local currency.

Can volunteers still get checks or do they have to have direct deposit?
IEEE will no longer be issuing checks for these reimbursements. All payments for expense reports processed through NextGen Expense Reimbursement will be issued electronically.

Are there any issues with direct deposit in some countries?
In accordance with U.S. government regulations, payment is not allowed to some countries (see list [PDF]). In these instances, continue to use the current Excel spreadsheet process.

Is my data within the platform secure?
Yes, it meets ISO, SSAE, and PCI Compliance standards, ensuring the utmost in security measures.

Do I have to enter my banking information if I'm only submitting an expense report for items that were charged on my Corporate credit card?
Yes. You will not be able to submit an expense report without first entering your banking information into the system.

Can I use a separate bank account other than my personal banking account?
Yes. Each user must provide a bank account in their personal profile settings. If you seek to create a separate bank account to be used only for expense reimbursement, this option is available to you.

Overview and Benefits of NextGen Expense Reimbursement

What is the NextGen Expense Reimbursement tool?
The NextGen Expense Reimbursement tool is an electronic, expense reporting and reimbursement platform that's fast and efficient. IEEE volunteers will use this tool to submit expense reports for reimbursement rather than the current paper process.

Why did IEEE choose this system?
The expense reimbursement tool is a robust and user-friendly platform that delivers a broad range of benefits to users, including:
- Faster reimbursement, due to elimination of the manual paper process and reduction in cycle time from expense report submission to reimbursement
- Integration with other online applications and improved receipt submission
- Ability to track in real time the status of expense reports including an email notification of expense report approval status
- Availability of a mobile app to support users on a smart device at any time
- Improved processing of international payments
- Improved overall reporting

Why is IEEE making this process change?
IEEE listened closely to the feedback of its volunteer community. Based on their requests for a more efficient expense reimbursement process that gives volunteers greater visibility to the status of their reimbursements, IEEE is making the change from a paper-based expense process to an electronic platform.

What will change from the current process when we move to the new expense reimbursement process?
We are transitioning from a paper process to an electronic process. Instead of creating and submitting expense reports on paper, IEEE volunteers will be creating, submitting, reviewing, and/or approving expense reports electronically through NextGen Expense Reimbursement. Registration is now available; you can request access to the tool by using your IEEE account.

Does this change in process benefit IEEE as well?
Yes. In addition to creating an easier and more efficient process for volunteers, the new platform will also deliver a range of benefits to IEEE. These benefits include a more efficient and less manual process for reviewing, approving, and paying expense reports; and enhanced reporting and data capture for more detailed and thorough analysis of expense reimbursements by IEEE. The new platform also supports IEEE's quality and compliance objectives with its simplified internal controls and audit capabilities to validate expenses.

Do I have to use system -- can I just keep doing expenses the way I used to do them?
No, after the go-live date (see schedule above), all paper expense reports will be returned to the volunteer for re-submission in the new system. The new platform has been endorsed by the IEEE Financial Committee (FinCom) to move IEEE away from paper forms and receipts, delayed payments, and the inability to track the status of reimbursements. NextGen Expense Reimbursement is a robust and user-friendly platform that will deliver a broad range of benefits, including electronic submission, ease of use, faster reimbursement, visibility into approval flow, and security of personal information.

Additional Resources

Where can I go for more information?
In addition to the various communications that IEEE volunteers and professional staff members will be receiving over the coming months to help support their understanding of and transition to the new platform, information also is available on **ieee.org/expense**.
- Volunteers may reach out to the SAP Concur user support desk (PDF) for technical assistance.
- Contact IEEE's project team at nextgenexpense@ieee.org for general assistance or questions.

How will volunteer leaders approve the expenses of other volunteers who they have the responsibility to approve?
Those volunteer leaders (i.e., Treasurers that have rights to paper process approval) will have the same approval authority in NextGen Expense Reimbursement. For further information, please refer to ieee.org/expense.

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