NextGen Expense Reimbursement Checklist

Use this checklist as a quick reference guide. IEEE volunteers can find more details in the FAQs on www.ieee.org/expense

PRIOR to completing your first expense report

☐ Establish an IEEE account (aka web account) if you do not already have one. Visit www.ieee.org/expense for instructions.

☐ Create a NextGen Expense Reimbursement account. Visit www.ieee.org/expense for instructions. Note: it may take up to 24-36 hours for your account to be created.

☐ Access NextGen Expense Reimbursement at www.ieee.org/expense and click the orange login button. No separate username or password is required to access the system due to single sign-on integration.

☐ Complete your user profile by clicking Profile > Profile Settings. View personal information, verify email addresses, select email notification preferences, enter banking information, etc.

☐ Download the mobile app to your mobile device. Create or approve expense reports on the go. The single sign-on code for the mobile app is EDDB6G.

☐ Scan, or take photos of receipts (via the mobile app), or email them to your account using receipts@expenseit.com.

Completing your expense report

☐ Submit your expenses for reimbursement within 60 days from when they were incurred in accordance with the IEEE Travel & Expense Reimbursement Guidelines.

☐ Enter a descriptive Report Header (expense report title) that best describes the purpose of your expense report.

☐ Consolidate expenses/trips on a single expense report when possible. For volunteers, multiple expense report purposes (ERP’s) can be used for one expense report.

☐ Create a separate entry for each expense. Enter each expense in the currency in which the transaction was incurred. When applicable, the system will automatically calculate any necessary currency conversions on your behalf.

☐ Ensure the Transaction Date is equivalent to the date when the expense was incurred (date indicated on the receipt).

☐ Attach a receipt for every expense that exceeds $25.00 USD (some exceptions apply).

☐ Select the personal expense checkbox only if the expense was personal in nature and is not subject to reimbursement.

Contact nextgenexpense@ieee.org for any inquiries.