

# 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](http://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](http://www.ieee.org/expense) for instructions.
- Create a NextGen Expense Reimbursement account.** Visit [www.ieee.org/expense](http://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](http://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](mailto: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](mailto:nextgenexpense@ieee.org) for any inquiries.