

IEEE HOUSTON SECTION TRAVEL POLICY

Purpose: The following Travel Policy is intended to provide overall guidance to Houston Section members while on official IEEE Travel status. **This Travel Policy is of a general nature; however, the Section Chair should approve any deviation in advance.** The Houston Section Travel Policy shall take precedence over IEEE Travel Policy Guidelines.

- A. **Meeting Attendance Authorization:** The section chair will authorize individual attendance to any approved IEEE business meeting unless the funding is allocated from an approved budget category (*i.e. Chapter or other Section officers can use budgeted funds for participation in IEEE Meetings. For example the chapter chair may use some of the groups budgeted funds to attend the annual society conference or the PACE chair may use some of the groups budgeted funds to attend the annual IEEE USA conference*).
- B. **Travel:** When traveling to and from IEEE-approved business meetings, coach class airline fare is approved; however each member is encouraged to make travel arrangements well enough in advance to acquire the least cost discount airfare. If a member on official IEEE business chooses to travel by personal vehicle, the allowable mileage expense reimbursement is as established by IEEE. The total reimbursement for mileage and parking will be limited to the cost of coach class airfare, the cost of airport parking and/or local transportation costs, mileage to/from airport, and shuttle costs when determining the driving versus flying justification. The Mileage Reimbursement Worksheet must be provided.
- C. **Local Travel Expenses:** Except by prior authorization of the section chair, rental car expenses are not allowed. Members are encouraged to use reasonable local transportation (*i.e. courtesy vans, shuttle buses, taxis, etc.*) that incurs the least cost. Intercity transportation between business functions or to meal locations should be kept to a reasonable cost in view of local conditions.
- D. **Parking Expenses:** Reasonable parking expenses are allowed for travel by personal automobile (subject to the total reimbursement limitation listed in paragraph (B) above) and are authorized for approved rental car or local trip use.
- E. **Entertainment Expenses:** Entertainment expenses are reimbursable to the extent that they supplement or enhance a legitimate IEEE official function. Personal entertainment expenses (*i.e., social, movies, nightclubs, etc.*) are not reimbursable.

- F. **Conference Fees:** Conference fees for Chair-approved IEEE functions are fully reimbursable.
- G. **Spouse Expenses:** Spouse's expenses while accompanying a member on official IEEE business are not reimbursable except by prior authorization of the section chair. Such expenses include but may not be limited to, travel, meals, entertainment, and tips. While on travel status where the member and spouse share a room, the member is responsible for any incremental costs, (room and taxes) associated with the double occupancy versus a single occupancy.
- H. **Guest Expenses:** Guest expenses are not reimbursable except by prior authorization of the section chair.
- I. **Documentation of Expense:** All expenses should be documented for propriety and audit purposes.
- A copy of the airline travel ticket will document airline travel expenses.
 - Meals, if the per meal cost is greater than \$25, must be documented by a receipt. Local transportation expenses exceeding \$25 per individual trip also require a receipt.
 - Personal vehicle mileage reimbursement over \$25 must be documented by a printout of the point-to-point mileage estimate from MapQuest (or similar service).
 - Tips for any service should be clearly separated from other expenses on any consolidated receipt. Out-of-pocket expenses (i.e., baggage assistance, bellhop, etc.) are exempt from receipt requirements.
 - The designated IEEE expense reporting form will be the only one accepted for reimbursement of travel expenses (NO modifications of the expense reporting form are allowed).

Methods for Report Submittal

Electronic Expense Report Submittal (Preferred)

All items should be emailed to Houston Section Chair with copy to Houston Section Treasurer within 30 days of the date the expense is incurred.

Electronic expense reimbursement requires:

- Completed Funding Request (copy of email approval if non-budgeted travel)

- Completed IEEE Expense Report Form with the words “e-signed” in the signature block and dated **OR** scanned copy of signed and dated form
- Scanned receipts as required
- Documented rental car approval from section chair (if requesting car rental reimbursement)
- Completed Mileage Reimbursement of personal vehicle form (if personal vehicle is used in place of air travel)

Hardcopy Expense Report (Alternative)

Expense reimbursement requests should be mailed to the Houston Section Chair (please keep copy for your records) within 30 days of the date the expense is incurred.

Hardcopy expense reimbursement requires:

- Copy of completed Funding Request
- Copy of completed IEEE Expense Report Form with signature and date
- Copy of receipts as required
- Copy of documented rental car approval from Section Chair (if requesting car rental reimbursement)
- Copy of completed Mileage Reimbursement of personal vehicle form (if personal vehicle is used in place of air travel)

Note:

Checks must be deposited or cashed within 90 days of their issue date. At maximum, all expense reports must be submitted within 6 months of the occurrence of the expense and resolution of any discrepancies or additional information needs resubmitted within 90 days of notice of the discrepancy or need for additional information. Pending reimbursements are subject to cancellation subsequent to this period.