

IEEE UFFC Society (UFFC-S) Travel Reimbursement Policy

IEEE Ultrasonics, Ferroelectrics, and Frequency Control Society (UFFC-S)

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Note: A Microsoft Word version of this document is accessible at:

https://ewh.ieee.org/conf/ius_2008/z_doc_misc/04_old_2015_ieee_uffcs_travel_reimbursement_policy.doc

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1. General Requirements:

1.1. IEEE Policy on Travel Reimbursements:

The overall IEEE Policy on allowable travel reimbursements is defined in the IEEE Financial Operations Manual Section 6 (“FOM.6”) at

https://www.ieee.org/documents/financial_ops_manual.pdf

and Section 11.6 of IEEE Policies at:

https://www.ieee.org/documents/ieee_policies.pdf

The spirit of the IEEE Policy noted above is to “book only the most economical airfare, i.e., non-refundable, economy-class, coach-fare tickets,” with certain exceptions.

UFFC-S’s Travel Reimbursement Policy necessarily conforms to IEEE’s policy and the following are UFFC-S Policy details relevant to eligible UFFC-S members’ travel reimbursement.

1.2. Business and First Class Travel:

Reimbursement for higher-class airline tickets (Business Class and above) requires that the tickets were budgeted, along with prior IEEE approval per the IEEE Financial Operations Manual Section 6. UFFC-S also requires prior approval by the UFFC-S President and Finance Chair. UFFC-S allows the traveler to book a Business Class or higher ticket but may only claim the documented lowest cost available airfare for the same route and dates; typically this is Economy Class. Those intent on doing this should at the time of booking obtain a document, e.g., via airline website, showing the lowest cost airfare they would otherwise have paid had they not flown in a higher class.

1.3. Upgrade for Extra-Leg-Room Seating:

Upgrade charges for extra-leg-room seating are allowed on a flight time over 8 hours within a single flight segment.

1.4. Procedure to File Expense Report:

Expense reports for travel should be submitted via email whenever possible. Electronic copies of the expense form and receipts are accepted by IEEE. Individuals to whom the expense reports should be submitted to are given in Section 12 at the end of these policies.

All reimbursement requests must be submitted using the appropriate IEEE Travel Expense Form: http://www.ieee.org/about/volunteers/committee/finance/finance_expense_report.html

In order to expedite reimbursement (i.e. to prevent “rejections”), please note that IEEE requires receipts for expenses over \$25 and the date, place, and purpose of each day’s activities entered in the appropriate individual cells. Lodging and other expenses should be itemized by day, not totaled or lumped for the trip. If “Other” is selected for the individual’s function in the “Member of:” cell, please also enter the appropriate description in the cell below. Also, be sure to enter your IEEE Member number.

Reimbursement funds can be transferred electronically via bank wire to individuals where that method is more convenient than reimbursement by paper check; please include at the following information in the IEEE Wire Transfer Request Form that is accessible from the UFFC-S AdCom website at <https://ewh.ieee.org/soc/uffc/adcom2014/> and then go to the link “3. UFFC-S Finances”:

- 1) Bank name
- 2) SWIFT code or BIC
- 3) IBAN number or account number
- 4) Account owner(s)
- 5) Currency in which you wish to receive the wired payment (e.g. Euro, etc)

1.5. Travel Advances:

UFFC-S recognizes that the cost of travel may be a burden to some. Travel advances for the airfare and any pre-paid expenses (e.g. hotel accommodations) are available through IEEE and are processed through the UFFC-S Treasurer. Please contact the Treasurer for details well in advance if you wish to request a travel advance. It usually takes two to three weeks to process an advance. Funds can be made available via check or bank wire transfer.

1.6. Typical Processing Time at IEEE:

Typical processing time for expense reports at IEEE is about 3 weeks to the mailing of the check or bank wire. Please contact the UFFC Treasurer if you do not receive your reimbursement in that timeframe or if you do not see an email copy of the Treasurer’s submittal of your expense report to IEEE within a few days of when you sent it to the Treasurer.

2. Summary of Those Who May Be Considered to Receive Travel Support (please check conditions and details for getting support in relevant sections below):

- (i) Voting and Non-Voting AdCom Members defined in the UFFC-S Bylaws and special guests of the President to attend the AdCom meetings
- (ii) One of UFFC-S Representative(s) to each of the IEEE Councils/Societies/publications and others that UFFC-S co-sponsors to attend AdCom meetings
- (iii) President-Elect to UFFC-S Standing Committee meetings and IEEE meetings
- (iv) Six Vice Presidents to attend any of the three technical Standing Committee meetings
- (v) Vice Presidents for Publications, Symposia, and Finances to relevant IEEE meetings
- (vi) Award winners who request for support and accompanying guests for medical assistance to the winners
- (vii) Key conference organizers for functions of respective conferences
- (viii) Miscellaneous (UFFC-S Treasurer for relevant IEEE meetings; Committee leaders who have a budget approved by the AdCom; UFFC-S Awards Chair to present awards in UFFC-S symposia; UFFC-S representatives to Committee meetings that they represent but the meetings do not provide travel support, etc)
- (ix) UFFC-S President for Society functions

3. Travel Reimbursement of AdCom:

3.1. Reimbursable Expenses:

First, UFFC-S asks that all who are eligible for travel support seek financial support from their employer before submitting expenses to AdCom. Second, while UFFC-S asks that everyone try to keep their expenses down as much as possible, the annual travel reimbursement limit for an eligible individual who attends the AdCom meeting is \$4,500 with a maximum of \$3000 per trip. Please obtain prior authorization from the President if you anticipate expenses that will exceed either of these limits.

UFFC-S covers round trip coach airfare, one or two night's hotel, food on the day before and/or after the AdCom meeting based on your actual travel schedule, and transportation to and from the meeting. Please use public transportation (taxi, bus, etc) in lieu of renting an automobile, unless a car rental is less expensive. UFFC-S provides food for all meals on the day of the AdCom meeting. Receipts are required for any items over \$25.

Sometimes additional hotel nights are needed to obtain a discount on airfare such that the total expenses with a Saturday or other night stay reduces the overall cost. In this case, the number of hotel nights could be increased with prior approval of the UFFC-S Treasurer or President.

3.2. Eligible Individuals:

The eligible individuals for travel reimbursement are those defined in the UFFC-S Bylaws below plus guests of the President (the guests normally include one out of a couple UFFC-S representatives to each of the IEEE Councils, Journals, and Committees that UFFC-S co-sponsors, and special guests that the President invites):

"3.1 AdCom Composition. Section 5.1 of the UFFC-S Constitution states that AdCom shall consist of not more than 24 Voting Members (including 12 Elected AdCom Members plus not more than 12 UFFC-S Officers), plus additional Non-Voting Members as specified in these Bylaws. The Non-Voting Members of AdCom shall consist of: (1) the Standing Committee Chairs who are not UFFC-S Officers, (2) the Ad Hoc Committee Chairs, (3) the Student Representatives of AdCom, (4) the Transactions Editor-in-Chief (EIC), (5) the Transactions EIC-Elect, (6) the Newsletter EIC, (7) the Web EIC, (8) the General Chairs of UFFC-S-sponsored technical conferences for the past year and upcoming two years (in the event of a conference with General Co-Chairs, the corresponding Technical Standing Committee Chair shall designate one of them to represent at AdCom), and (9) AdCom emeriti."

4. Travel Reimbursement of President-Elect and Vice Presidents of the three Technical Standing Committees:

The President-Elect and Vice Presidents for the three technical Standing Committees are granted travel support to attend all three technical Standing Committee meetings if they could not obtain other sources of support.

The President-Elect also is granted travel support to attend relevant IEEE meetings with prior approval of the President.

5. Travel Reimbursement of Vice Presidents for Publications, Symposia, and Finance:

The Vice Presidents for Publications, Symposia, and Finance are granted travel support to attend relevant IEEE meetings with prior approval of the President.

They may also be granted travel support to attend the three technical Standing Committee meetings with prior approval of the President or with the invitation of the Vice President for the hosting Standing Committee if they were unable to obtain other sources of support.

6. Travel Reimbursement of Awards Winners:

In some cases, UFFC-S and its Standing Committee Awards Winners request a full or partial travel support to attend award ceremonies. Prior approval of the President must be obtained for such support.

Guests who accompany awards winners who need medical assistance may be granted travel support with prior approval of the President.

7. Travel Reimbursement of Distinguished Lecturers:

The budget for the Distinguished Lecturer (DL) travel is set by the UFFC-S AdCom. The DL travelers must follow the policy of IEEE FOM Section 6. All expenses that exceed the amount approved by the UFFC-S AdCom need to be approved by the President. Expense reports should be processed according to the General Requirements in Section 1 above.

8. Travel Reimbursement of Conference Organizers:

If budgeted in the conferences, key conference organizers such as General Chair(s), Technical Program Committee (TPC) chair(s), Finance Chair, Exhibits Chair, and others are granted travel support for conference site visits and other conference functions with the approval of the conference General Chair(s).

The Vice President for Symposia is granted travel support within the AdCom budget for conference site visits with prior approval of the President.

9. Miscellaneous Travel Reimbursements:

Other travel support (such as UFFC-S Treasurer to attend IEEE Treasurer's Workshop and other relevant IEEE meetings, Committee leaders who have a budget approved by the

AdCom to attend IEEE and UFFC-S meetings, UFFC-S Awards Chair to present awards in UFFC-S symposia, and UFFC-S representatives who attend meetings of the Committees that they represent where the Committees do not provide travel support as specified in their governing documents such as Constitution or Bylaws) may be granted case-by-case by the President.

10. Travel and Other Support for the President:

AdCom approves the budget for the President's discretionary fund for travel support, miscellaneous expenses for Society functions, and projects that the President judges necessary.

11. Travel Expenses Not Covered:

Except where noted earlier as being allowed, the following travel expenses are not covered:

- (i) Expenses of Guests
- (ii) Committee members who attend their respective committee meetings.
- (iii) Symposia registration fees (except for the President, President-Elect, and UFFC-S Awards Chair, and other special cases with the President's prior approval).

12. Notes:

12.1. Expense reports sent to the President:

For travel support that: (a) needs the prior approval of the President, (b) exceeds \$4,500 annual allowance or \$3,000 per trip for attending the AdCom meetings, (c) is from the guests of the President to attend the AdCom meetings, expense reports should be sent to the President via email. The President will then approve the reports and forward the email to the UFFC-S Treasurer who will check the reports for their compliance to relevant IEEE and UFFC-S guidelines before submitting the reports to IEEE.

12.2. Expense reports sent to Conference General Chair(s):

For conference-related travel support that needs the prior approval of the General Chair(s), expense reports should be sent to the General Chair(s). The General Chair(s) will then

forward the reports to the Conference's Finance Chair with a copy to the UFFC-S Treasurer for reimbursement via the chosen conference banking system.

12.3. Expense reports sent to the UFFC-S Treasurer:

All other expense reports should be sent to the UFFC-S Treasurer.