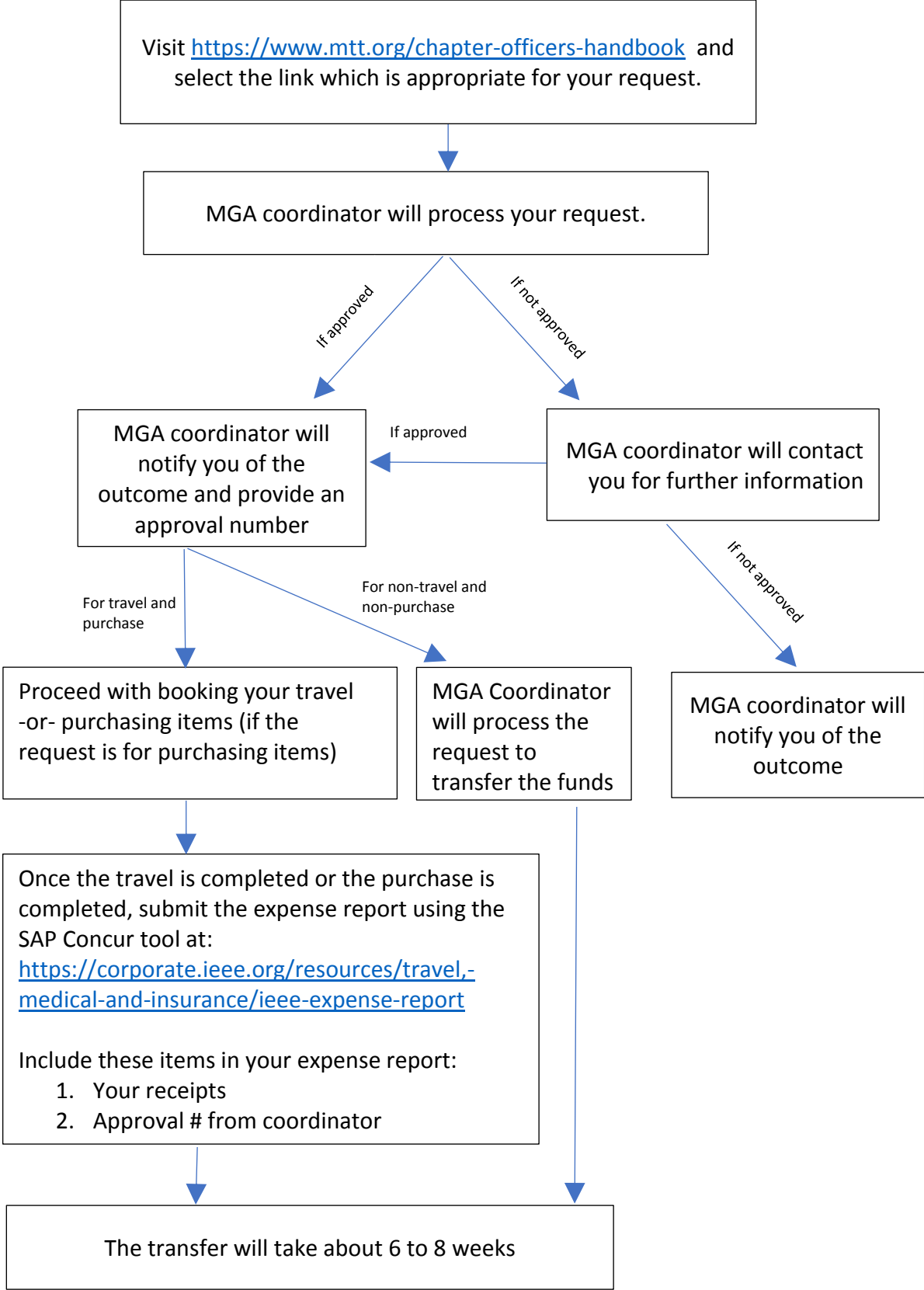


# MGA Financial Request Flow Chart



# Where to type the approval number into Concur

## Step 1:

The screenshot shows the SAP Concur dashboard. At the top, there are navigation tabs for 'Expense', 'Approvals', and 'App Center'. The user is logged in as 'IEEE' with the tagline 'Advancing Technology for Humanity'. The dashboard displays several key metrics: 'Start a Report' (highlighted with a green box and an arrow), 'Upload Receipts', 'Required Approvals', 'Available Expenses', and 'Open Reports'. Below these metrics, there is a 'COMPANY NOTES' section with a link to 'Concur Training Toolkit'. The 'MY TASKS' section shows three cards: 'Required Approvals', 'Available Expenses', and 'Open Reports', each with a '00' indicator and a checkmark icon.

## Step 2:

The screenshot shows the 'Create a New Expense Report' form. The 'Report Header' section includes fields for 'Report Name', 'Report Date', and 'Comment'. The 'Report Name' field is highlighted with a green box and an arrow, with a green text annotation above it that reads 'Use the approval number sent by the coordinator'. Below the 'Report Name' field, there are four dropdown menus for 'Expense Report Purpose Level 1' through 'Level 4'. The 'Report Name' field contains the text '-Pre-Approval-Travel-Number-'.

Receipts are added to the report during the next step.

If Concur lists your email address as “verified”, then you can email photographs of your receipts from your email address to [receipts@concur.com](mailto:receipts@concur.com). To learn if your email address is verified, log into Concur and check the profile information.

# Supplemental Information

## Contact Information Updates

In order to share important information with your chapter, we need the correct names and emails for your current Chapter Officers.

<https://www.mtt.org/reporting-chapter-officer-changes>

## Distinguished Microwave Lecturers & Speakers Bureau

<https://www.mtt-tcc.org/distinguished-microwave-lecturers>

<https://www.mtt-tcc.org/speakers-bureau>

## Information on Publications

<https://www.mtt.org/publications>

## Policy on Travel Assistance to Attend Chapter Chair Meeting (CCM)

<https://www.mtt.org/chapter-officers-handbook/travel-funds-for-chapter-chair-meeting-attendance/>

## Policy on Chapter Activity Support

The amount of support will be \$1000 for chapters comprised only of MTT-Society members, or \$500 for joint chapters which are associated with other IEEE Societies (such as AP, ED, EMC, etc.). Chapter officers can use the form to apply for chapter activities support starting in January of each calendar year. Decisions concerning what chapters will receive support are usually made within one month of receiving the application. Funding later in the year is usually available, but not guaranteed.

## Policy on Workshop/Symposia Support

The MTT-S AdCom has established a fund to aid needy chapters in putting on workshops and symposia. The fund provides \$500 seed money per chapter to aid in putting on a yearly workshop or symposia. We have limited funding so please do not apply unless the money is truly needed. With the approval of the Chair of the Membership and Geographic Activities (MGA) Committee, funding of up to \$1000 may be approved for a local chapter Workshop or Symposia. However, if you are applying for more than \$500 Workshop/Symposia support, you cannot use this form. You must develop an event proposal with a complete budget, descriptions of the program, expected attendance, etc. and submit it to the MGA committee chair. Please note that this funding is very limited. Regardless of the amount of funding requested, a qualifying workshop or symposia must be at least four hours in length, and an IEEE membership booth must be present at the event.