

How to submit and sign electronically your Online Travel Reimbursement Request (OTRR)

User guide

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1. Introduction

The purpose of this document is to provide a step-by-step guide on how participants invited to COST Action events and deemed eligible for the reimbursement of their expenses can submit and sign electronically an Online Travel Reimbursement Request (OTRR).

The Online Travel Reimbursement Request (OTRR) feature allows each participant to directly encode into e-COST the accommodation and travel expenses incurred when attending a COST Action event, as well as to upload the supporting documents linked to their reimbursement request.

The eligible number of nights and the number of meals are based on a flat rate and calculated automatically based on the travel information (dates and hours) entered by the participants. Any potential meals provided by the Local Organiser are automatically deducted. It is the responsibility of the participant to deduct any additional meal(s) covered by other parties.

The electronic signature enables Action participants to identify themselves as unique individuals to the e-COST system in a secure way, and significantly improves the efficiency of the reimbursement procedure by reducing the processing times - not to mention its environmentally-friendly aspect, as it also minimises the need for printouts and paper in general.

For complete information on what expenses can be claimed on the OTRR, please refer to the COST Vademecum, at www.cost.eu/Vademecum.

For frequently asked questions, please consult our FAQ section available on the COST website at http://www.cost.eu/participate/networking/grant_holder_qa

2. RULES FOR SUBMITTING TRAVEL REIMBURSEMENT REQUESTS AND CLAIMING EXPENSES

- Create an e-COST profile at <https://e-services.cost.eu> including your bank details
- Submit in e-COST a completed Online Travel Reimbursement Request (OTRR) form within 30 calendar days from the end date of the COST event, along with supporting documents (readable copies of invoices / receipts) relevant to the eligible expenses that are being claimed. Original invoices / receipts and other forms of supporting documentation must be kept and archived by each claimant.

| ACCOMMODATION & MEALS | | SUPPORTING DOCUMENTS TO BE UPLOADED IN E-COST | |
|--|--|---|--|
| Same flat rate for all participants <ul style="list-style-type: none">Hotel: Up to max 120 €/nightMeal: Up to max 20 €/meal (only lunch and dinner) | | <ul style="list-style-type: none">No receipts required | |
| LONG DISTANCE TRAVEL EXPENSES | | | |
| <ul style="list-style-type: none">Flight (International/Domestic) (Up to 1200 € on Economy Class) | | E-tickets: name of the participant, full itinerary including flight date and time, booking class and airfare. Derogations require prior COST Association approval. | |
| <ul style="list-style-type: none">Train Cross-BorderBus Cross-BorderFerry Cross-Border | | Receipt including date, time, route and rate (First class or Business class are eligible) | |
| LOCAL TRANSPORT EXPENSES | | | |
| <ul style="list-style-type: none">Train within 1 countryBus within 1 countryMetro within 1 countryShuttle within 1 country | | PUBLIC TRANSPORT < 25 € for the entire duration of the journey | PUBLIC TRANSPORT > 25 € for the entire duration of the journey |
| | | No receipts required | All public transport receipts are required |
| <ul style="list-style-type: none">Car Travel across border or within 1 country0.20€/km when travelling alone0.30€/km when travelling with another eligible COST passenger (the driver is NOT a passenger) | | A print out from an online route planner (eg. Google maps, MapQuest, Bing maps, etc) showing the route taken and the number of kilometres travelled (up to max 2000 km round trip). | |
| <ul style="list-style-type: none">Taxi | | Receipt showing date, time, and the amount paid. Limited to up to max 80 € in total for the entire trip if these conditions are met: <ul style="list-style-type: none">Before 7 am to facilitate an early departure and/or after 10 pm due to a late arrivalor when no public transportation available | |
| <ul style="list-style-type: none">Parking | | Receipt including date and time (max one day before the meeting and one day after the meeting) | |

3. How to submit and sign your OTRR electronically

The scenario used as an example in this guide concerns a COST Action MC and Working Group Meeting, taking place on 27-28-29 June 2018, in Slovenia, with 3 meals provided by the Local Organiser.

3.1 The invited participant who is deemed eligible for reimbursement receives an automatic e-COST invitation which indicates for which sessions the participant can claim reimbursement:

Dear participant,

You are invited to attend the following COST Meeting as a Meeting Participant: COST Action: CA15.

- Meeting Title: COST Action Meeting and WG meeting
- Location: Slovenia
- Meeting Type: Management Committee Meeting and WG meeting
- Meeting Dates: from 2018-06-27 10:00:00 to 2018-06-29 18:00:00

Session(s) to which you are invited:

- Management Committee Meeting: from 2018/06/27 09:00 to 2018/06/27 13:00 (eligible for reimbursement)
- Working Group Meeting: from 2018/06/27 14:00 to 2018/06/29 17:00 (eligible for reimbursement)

The expenses related to your participation during the above-mentioned dates will be reimbursed based on your request and according to COST Rules of Reimbursement that you can consult here: www.cost.eu/VADEMECUM.

Please confirm or decline your participation in this event by clicking on the following link: <https://e-services.cost.eu/invitation/53824fff3f74dda8b018c199a34ff745/>

If you are new to e-COST, you can register a new e-COST profile on the following link: <https://e-services.cost.eu/>

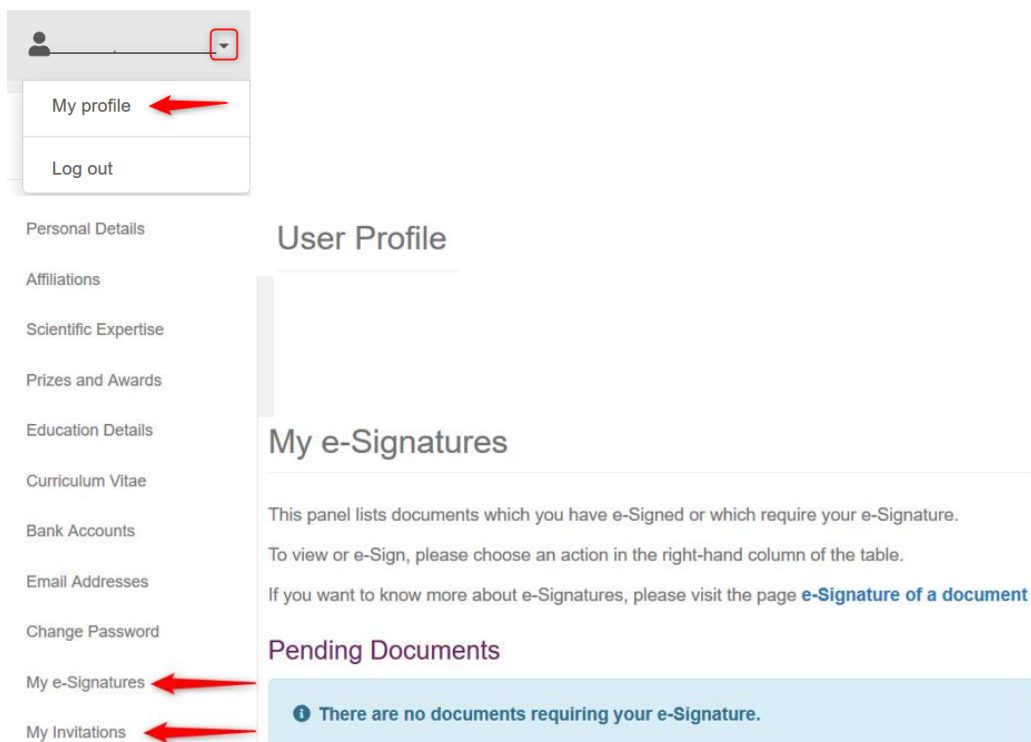
Kind regards,

Grant Holder

3.2 The participant clicks on the link provided in the invitation and logs into e-cost.

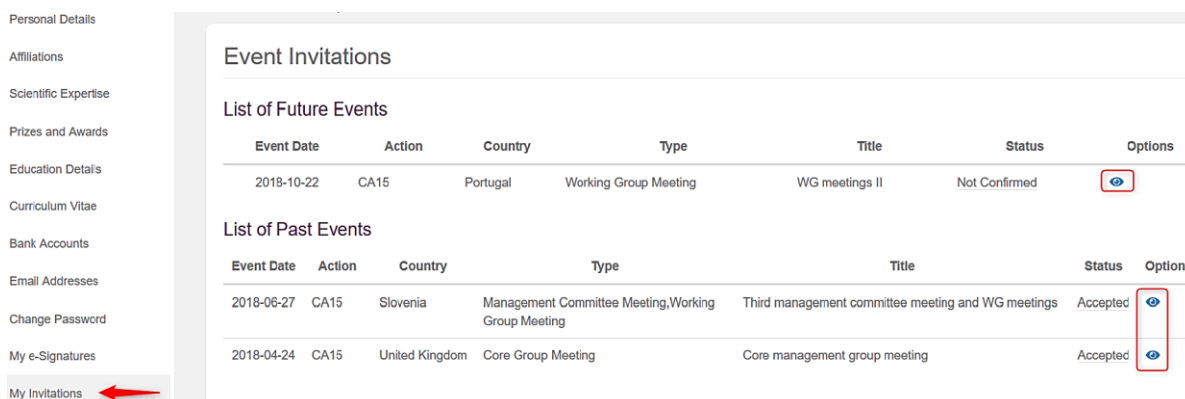
An overview of the participant's event invitations and claims which require an electronic signature is available in e-COST and accessible through the option 'My profile' followed by selecting from the menu the relevant option.

The Online Travel Reimbursement Request can only be signed one day after the event finished. Until then, the overview page will show that there are no documents to be signed.






The screenshot shows the e-COST user interface. On the left, a sidebar contains a list of menu items: Personal Details, Affiliations, Scientific Expertise, Prizes and Awards, Education Details, Curriculum Vitae, Bank Accounts, Email Addresses, Change Password, My e-Signatures, and My Invitations. A red arrow points to the 'My profile' option in the top right dropdown menu. Another red arrow points to the 'My e-Signatures' menu item. The main content area is titled 'User Profile' and 'My e-Signatures'. It contains a message: 'This panel lists documents which you have e-Signed or which require your e-Signature. To view or e-Sign, please choose an action in the right-hand column of the table. If you want to know more about e-Signatures, please visit the page [e-Signature of a document](#)'. Below this, a section titled 'Pending Documents' shows a blue box with the message: 'There are no documents requiring your e-Signature.'

The overview of the invitations you received (for past and future events) is displayed as below. The OTRR can be accessed directly through the 'Options' icon.



The screenshot shows the 'Event Invitations' section of the e-COST user interface. The sidebar on the left has a red arrow pointing to the 'My Invitations' menu item. The main content area is titled 'Event Invitations' and contains two tables: 'List of Future Events' and 'List of Past Events'.

| Event Date | Action | Country | Type | Title | Status | Options |
|------------|--------|----------|-----------------------|----------------|---------------|---|
| 2018-10-22 | CA15 | Portugal | Working Group Meeting | WG meetings II | Not Confirmed |  |

| Event Date | Action | Country | Type | Title | Status | Options |
|------------|--------|----------------|---|--|----------|---|
| 2018-06-27 | CA15 | Slovenia | Management Committee Meeting, Working Group Meeting | Third management committee meeting and WG meetings | Accepted |  |
| 2018-04-24 | CA15 | United Kingdom | Core Group Meeting | Core management group meeting | Accepted |  |

3.3 The participant confirms or declines his/her participation before the event:

Invitation / COST Association Event

Meeting Details

| | |
|------------|--|
| Meeting ID | ECOST-MEETING-CA15-270618-097 |
| Title | Third management committee meeting and WG meetings |
| Start Date | 2018/06/27 |
| End Date | 2018/06/29 |
| Location | Slovenia |

Session(s) to which you are invited:

| | | |
|-----------------------|---|------------------------------|
| Management Committee | from 2018/06/27 09:00 to 2018/06/27 13:00 | (eligible for reimbursement) |
| Working Group Meeting | from 2018/06/27 14:00 to 2018/06/29 17:00 | (eligible for reimbursement) |

Step 1/5 Invitation



Please advise us if you intend to come to the event.

3.4 The participant confirms whether or not (s)he wishes to claim the reimbursement of the expenses.

Step 2/5 Reimbursement



You are eligible to claim reimbursement of your expenses related to this event. Do you wish to submit a claim?

3.5 The participant can start completing online the request for reimbursement:

3.5.1 Travel Dates and Meeting Attendance

Travel start date and travel end date are automatically populated with the meeting dates and are editable. The drop-down menu allows the participant to select the departure time (from home/ starting location) and the arrival time (back home/arrival location).

The participant needs to complete the attendance to the meeting by selecting the date(s) for which the attendance list has been signed.

Travel and attendance information are necessary to automatically calculate the maximum number of nights and the maximum number of meals eligible to be reimbursed to the participant.

Step 3/5 Travel information and expenses

Please note:

- Local organiser has paid 3 meal(s) for this meeting, which has/have been automatically deducted from the number of eligible meals that you can claim.

Please carefully read the [Travel Reimbursement Request \(TRR\) Rules](#) before you encode your expenses.

| Travel dates (Door to Door) | | | |
|-----------------------------|------|------------|--------------------|
| Travel Start | Date | 2018-06-27 | Time 09:00 - 09:59 |
| Travel End | Date | 2018-06-29 | Time 17:00 - 17:59 |

| Meeting Attendance | | | |
|--|-------------------------------------|-------------------------------------|--|
| Please confirm your participation to the meeting. Please note that the dates below may not reflect the dates of the entire event, but only those dates for which you were invited. | | | |
| 27 Jun 18 | 28 Jun 18 | 29 Jun 18 | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

3.5.2 Accommodation and Meals expenses

The applicable flat rate is specified by the Grant Holder while creating the meeting. Using the available drop-down menu, the participant selects the number of nights and meals to be reimbursed.

Meals provided by the Local Organiser are automatically deducted from the reimbursement to individual participants. It is the responsibility of the participant to deduct any additional meal(s) covered by other parties.

| Accommodation expenses <i>i</i> | |
|---------------------------------|-----------|
| Number of nights | 0 |
| Applicable rate per night | EUR 90.00 |
| Reimbursable amount | EUR 0.00 |
| Justification | |

| Meals expenses <i>i</i> | |
|--------------------------|-----------|
| Number of meals | 0 |
| Applicable rate per meal | EUR 20.00 |
| Reimbursable amount | EUR 0.00 |
| Justification | |

| Accommodation expenses <i>i</i> | |
|---------------------------------|---|
| Number of nights | 2 |
| Applicable rate per night | |
| Reimbursable amount | 0 |
| Justification | |

| Meals expenses <i>i</i> | |
|--------------------------|-----------|
| Number of meals | 2 |
| Applicable rate per meal | EUR 20.00 |
| Reimbursable amount | EUR 40.00 |
| Justification | |

3.5.3 Long distance travel expenses

The following items are considered means of long distance transportation: plane, train, bus, car, and ferry.

The participant may encode as many long distance travel and/or local transport expenses as necessary to attend the meeting. All tickets, receipts, invoices related to these expenses must contain the itinerary, travel dates, price paid, e-ticket number for the airplane ticket, name of the passenger, and must be uploaded in e-COST.

Long distance (Cross border) travel expenses ⓘ
➔ [add](#)

Reimbursable amount EUR 0.00

LONG DISTANCE TRAVEL EXPENSES

Means of transportation

From

Country

Plane ▼
Plane
Train
Bus
Car
Ferry

--SELECT--

The participant can modify, delete, or add another leg of travel by clicking on one of the buttons shown below:

Long distance (Cross border) travel expenses ⓘ
➔ [edit](#) | [delete](#) | [add](#)

| | |
|-------------------------|---|
| Means of transportation | Plane |
| From | Madrid, Spain |
| To | Brussels, Belgium |
| Journey | Outward and return |
| Justification | I travelled from Spain instead of UK because I am currently working at a Spanish institute. |
| Reimbursable amount | EUR 750.00 |

3.5.4 Local transport expenses

The following items are considered means of local transportation expenses: public transport, taxis, car, parking, and ferries.

LOCAL TRANSPORT EXPENSES

Each participant must encode their expenses related to Local transport in the section below:

Expense type

Public Transport Expenses
Please Select
Public Transport Expenses
Taxi Expenses
Car Travel
Parking Expenses
Ferry Expenses

Public transport expenses are bus, train, metro and tram expenses incurred when travel starts and finishes within one country. Transport (bus, train, metro and tram) are as follows: If the amount claimed for the entire journey is equal to or less than EUR 25, no receipt is required. In any case, the local transport options for your journey(s) must be detailed in the relevant section below. If the amount claimed is more than EUR 25, then supporting documents justifying the total amount claimed must be provided by the participant. All segments of the journey must be detailed in the relevant section below.

Amount

Currency

EURO

Please detail the nature and price of your local transport expense(s)

Submit
Cancel

3.5.5 Other Expenses

The following items can be claimed as other expenses:

- entry visa processing costs,
- extra night(s) of accommodation (only with prior approval by COST Association)
- extra meal(s) (only with prior approval by COST Association),
- conference fees.

A prior approval must be obtained by the participants from the COST Association when requesting extra night(s) of accommodation and extra meal(s) and the confirmation uploaded as supporting document in the relevant section of the OTRR.

An extra night and extra meal will be automatically based on the flat rate encoded by the Grant Holder while creating the meeting. When these extra expenses are requested due to a force majeure incident, the reimbursement is done based on the actual expense incurred and the invoices must be uploaded by the participant in the relevant section of the OTRR.

Conference fees are reimbursable only if the participant attended a Dissemination meeting and is limited to up to 500 EUR. Conference fees for any other types of meetings are not reimbursable and will be deleted from e-COST.

3.6 The participant uploads all travel Supporting Documents

Each participant must upload all the supporting documents (airplane ticket, transport receipt etc.) as well as any justification linked to the expenses claimed, by first clicking on the 'Browse' button at the bottom of the page and then on the 'Upload' button.

This is mandatory in order to claim the reimbursement.



Supporting Documents

| | | | |
|---------------------|------------------|----------|--------|
| Attached Document 1 | flight itinerary | Download | Delete |
|---------------------|------------------|----------|--------|

Title / Description: (Example: plane ticket, receipts, etc.)

File to upload:

*By clicking upload, the selected document / file will be saved online.
You can upload files up to 2 MB each.
Supported file types are: pdf, xps, png, jpg, jpeg, gif.*

3.7 Select/Add the bank account on which to receive the reimbursement

Once all the expenses had been entered and the supporting documents have been uploaded, the participant must select the bank account to which the payment should be transferred.

Any already encoded bank account would be available in the drop-down menu. Otherwise, or if wanted, the participant has the possibility to add a new bank account.

After completion of this step, the participant can save and preview the OTRR. This allows the participant to review the request before submitting it.

Step 4/5 Bank Account

Select the Bank Account you would like to get reimbursed on above. To select a non-listed account, click "Add a new account".

After selecting your bank account, you will be able to preview a draft version of your TRR (Travel Reimbursement Request) Form to verify the details.

Once you have selected your bank account you will be able to review your TRR and submit your claim.

Now you can preview a draft version of your TRR (Travel Reimbursement Request) Form and verify the details.

3.8 Submission

The participant confirms that the claimed expenses are not being reimbursed by any other sources by clicking on the box next to this declaration. As soon as the box is ticked, the button “Submit e-Claim” will be available to allow participants to authenticate him/herself by providing the e-COST profile password and submit the OTRR.

Step 5/5 Submission

☒ declare that the above expenses are not being reimbursed from any other source.

The COST Association and the Grant Holder reserve the right to correct this document after signature by the participant to comply with COST Rules.

Click to submit your claim electronically.

Submit e-Claim

Once submitted, the participant cannot modify the request anymore. The Grant Holder is notified that the claim is ready to be reviewed. When the Grant Holder confirms the payment the participant receives an automatic e-mail mentioning the amount paid as well as the payment details.

3.9 The participant receives an e-mail notification containing the authorisation code necessary to complete the electronic signature of the OTRR.

Once the participant clicks on the button ‘Submit e-Claim’, an automatic e-mail containing the authorisation code is sent to his/her primary e-mail address. The confirmation e-mail is sent by "COST Association Notification <noreply@cost.eu>".

From: COST Association Notification <noreply@cost.eu>

Subject: **[e-COST] e-Signature required on Ref: ECOST-MEETING-CA15-270618-0977**

Your signature has been requested on the document [Ref: ECOST-MEETING-CA15-270618-0977](#)

To e-Sign this document, please click the sign document button below:

Sign document

If you are unable to click the button above, please go to <http://dev.qa.cost.local/e-signatures/sign/78d65a35-e6e4-4b17-a2a8-9414fd25aeb8/f38445e2-13cc-4d37-8b86-747e44999716> and follow the instructions.

288965

This code expires on **2 July, 2018 at 17:17:59**

If you have any questions in relation to e-Signatures of documents via e-COST please e-mail COST Association Support at e-cost@cost.eu.

The participant can always look at the list of all the documents waiting for his/her e-Signature on the page located in the e-COST profile: ‘My e-Signatures’. On this page, it is also possible to request a new confirmation e-mail. Only the last generated code is valid.

If, for any reason, the participant is still unable to e-sign the document, (s)he needs to contact the support (heldesk@cost.eu) and specify which file needs an e-signature.

3.10 The participant signs electronically the OTRR by entering the authorisation code in the appropriate field on the e-COST page

Take care: The e-Signature of this document is not completed yet

We have sent you an e-mail with instructions on how to e-Sign this document, please follow the instructions provided there in order to proceed. If you do not receive this e-mail, please read the explanation below.


Next: e-Sign Document


Dear Andrew Collins,

Your e-Signature has been requested on the document **Ref: ECOST-MEETING-CA15132-270618-097757**.

To complete this e-Signature, please enter the authorisation code (6 digit code) from the e-mail we sent to you into the field below and then click the button to e-Sign the document.

Authorisation code *






This e-Signature request expires on **2 July, 2018 at 17:17:59**

Confirmation e-mail

For security reasons, a **confirmation e-mail** is sent to your **primary e-mail address**.

By sending you an e-mail containing a security code, e-COST increases the security to be able to perform an e-Signature: it will confirm that you are really the user currently logged in.

This e-mail will explain how to proceed for the next steps. It contains a security code and clickable links to make it easy for you.



After submitting the claim, the participant has the possibility to download the claim only for their own personal file.

Invitation / COST Association Event

Your online reimbursement request has been successfully submitted and the Grant Holder has been notified. You may download the Travel Reimbursement Request(TRR) in pdf format for personal filing. No further action is required from your side.

[Download TRR](#)

Please contact the Grant Holder For any questions concerning the Online Travel Reimbursement Request, or the COST Association helpdesk at helpdesk@cost.eu if you experience any technical problems.