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

User guide

Version 4 – 2018-07-02
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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](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.

<table>
<thead>
<tr>
<th>ACCOMMODATION &amp; MEALS</th>
<th>SUPPORTING DOCUMENTS TO BE UPLOADED IN E-COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same flat rate for all participants</td>
<td>- No receipts required</td>
</tr>
<tr>
<td>- Hotel: Up to max 120 €/night</td>
<td></td>
</tr>
<tr>
<td>- Meal: Up to max 20 €/meal (only lunch and dinner)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LONG DISTANCE TRAVEL EXPENSES</th>
<th>SUPPORTING DOCUMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flight (International/Domestic) (Up to 1200 € on Economy Class)</td>
<td>E-tickets: name of the participant, full itinerary including flight date and time, booking class and airfare. Derogations require prior COST Association approval.</td>
</tr>
<tr>
<td>- Train Cross-Border</td>
<td>Receipt including date, time, route and rate (First class or Business class are eligible)</td>
</tr>
<tr>
<td>- Bus Cross-Border</td>
<td></td>
</tr>
<tr>
<td>- Ferry Cross-Border</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LOCAL TRANSPORT EXPENSES</th>
<th>PUBLIC TRANSPORT &lt; 25 € for the entire duration of the journey</th>
<th>PUBLIC TRANSPORT &gt; 25 € for the entire duration of the journey</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Train within 1 country</td>
<td>No receipts required</td>
<td>All public transport receipts are required</td>
</tr>
<tr>
<td>- Bus within 1 country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Metro within 1 country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Shuttle within 1 country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Car Travel across border or within 1 country</td>
<td>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).</td>
<td></td>
</tr>
<tr>
<td>- 0.20€/km when travelling alone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 0.30€/km when travelling with another eligible COST passenger (the driver is NOT a passenger)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Taxi</td>
<td>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:</td>
<td></td>
</tr>
<tr>
<td>- Before 7 am to facilitate an early departure and/or after 10 pm due to a late arrival</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- or when no public transportation available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Parking</td>
<td>Receipt including date and time (max one day before the meeting and one day after the meeting)</td>
<td></td>
</tr>
</tbody>
</table>
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/53824ffe5f774dda8b018c197b34f745/

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

**Invitation / COST Association Event**

**Meeting Details**
- Meeting ID: ECOST-MEETING-CA15-270818-097
- 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.
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.
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.

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

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

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.

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.
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.  

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>".

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/signp/78d565a35-e6e4-4b17-a2a8-9414fd25aebb/f38445e2-13cc-4d37-8b86-747e44899716 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

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.

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.