



COST – Best practices mini guide for participants

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DISCLAIMER: This document is not an official COST document. Please use it for internal purposes only as an internal guideline to assist participants in CA 21146 PurpleGain activities in their fulfilment of Online Travel Reimbursement Requests (OTRR).

GENERAL PRINCIPLES

Before diving into making your online travel reimbursement request (OTRR), COST strongly suggests taking a quick look at the "Travel Reimbursement Rules" in the Annotated Rules (pg.83-91) <https://www.cost.eu/uploads/2023/11/COST-094-21-Annotated-Rules-for-COST-Actions-Level-C-V1.4-Final-.pdf>. It's super helpful because you'll likely find answers to most of your questions there. Plus, it'll make processing claims way smoother by cutting down on mistakes.

Please be informed that **no travel arrangements should be made before receiving the formal invitation from e-COST or the grant letter**. In case of any Force Majeure situation, the expenses will not be considered as eligible.

Please submit your claim at the latest 15 days after the event with the required supportive documents. If the claim is not submitted within that period, it can be understood that the participant waves their right to reimbursement.

For face-to-face events, participants must sign the attendance list generated from e-COST. No signature, no daily allowance will be eligible!

If you are a **new participant** (i.e. have never participated in a PurpleGain activity), please send the following documents and information to the GHM (ana.gomez.rojo@urjc.es):

- Scanned copy of your passport
- Personal address
- Address of your bank
- For participants outside the EEA, indication of whether your bank accepts or not payments in €.

This information is requested by the URJC's Internal Payments Department and will be treated according to the GDPR and the [internal data protection policies and obligations](#).

NON-ELIGIBLE EXPENSES:

The following expenses must be deleted from e-COST:

- all short distance travel expenses up to 100 kilometres one way (example: RER tickets to the airport, as this is covered by the DA)
- Extra meals and nights in addition to the daily allowance or long-distance travel above a total of 1500€
- taxi, parking, car rental, fuel, tolls
- meals included in the flight ticket



- carbon tax, carbon offset fees
- fees, charges and/or penalties linked to a participant changing or having to rebook travel tickets
- medical / health / property insurance, COVID / PCR / antigen test, quarantine expenses, face masks
- long-distance travel expenses exceeding EUR 1500

SUPPORTIVE DOCUMENTS

General rules: invoice + booking confirmation or full flight itinerary

The travel supportive documents must include the following information:

- The name of the service provider;
- The mode of transport taken;
- The full price paid for the ticket;
- The name of the passenger, if applicable;
- The travel dates, **departure and arrival times** (an invoice only showing the amount will not suffice).
- *The type of extra charges claimed such as seat reservation, extra leg room, exit row seat, fast lane, priority boarding, sms priority boarding fees, sustainable fuel, luggage associated expenses, and the associated amount paid for, if applicable.*
- **NOT ELIGIBLE:** carbon tax & carbon offset fees!

IMPORTANT:

Please note that as of now the Finance Officers will check that the travel documents indicate **the arrival times (plane, train or bus tickets)**. **No claims will be approved without having this information.**

- In general, a **copy the e-ticket must be provided**, instead of the boarding passes. It is preferable not to upload the boarding passes unless they include the travel schedule (departure **and arrival time**).
- **IMPORTANT: The booking reference or the e-ticket number should be mentioned on the invoice in order to link the purchase to that specific ticket. This is one of the most frequent reasons for rejecting the claims.**
- **Screenshots of supportive documents are NOT acceptable.** The participants must provide the travel ticket or supportive document **in single pdf format** containing all the information. Claims with screenshots as supportive document will be rejected.
- If a participant departs on the last day of the meeting and declares travel end time **AFTER 3 AM** of the following day (i.e. receiving a full Daily Allowance), supporting documents must be submitted, such as: **accommodation or meal receipts**. Otherwise, the travel end time will have to be edited to arrive not later than 3AM.

Special cases:

- **Wizz Air:** The invoice from Wizz air is not sufficient as it doesn't include the time schedule of the travel. Therefore, copy of the flight booking confirmation shall be uploaded. The reason behind this request is because sometimes the Wizz air invoice is issued for several persons. Thus, the need to require copy of the booking confirmation as we can clearly see the name(s) of the passenger(s).



- **PEGASUS tickets:** In some cases, the invoices from Pegasus include expenses which are not clearly identified, such as “Diger”. Please ask the participant to provide with a reference from the Pegasus website about the nature and the cost of each expense. Otherwise, please remove them from the claim.
- In some case, even though the passenger name is not mentioned on some the train tickets issued in Germany, Switzerland, Italy, etc, they are still eligible for reimbursement.

Bank accounts

The participants are free to choose on which bank account they wish to be reimbursed: personal or institutional.

FAQ regarding travel deviation:

- I will **travel from another country** to the Meeting/Training School AND/OR from the event I am going to a conference in another country. Can I be reimbursed? **YES**
- I will **arrive few days before** the Meeting/Training School AND/OR I will **leave few days after** the event. Can I be reimbursed? **YES**. E-COST is designed to calculate the DA as if the person has travelled the day before or after the event.

COMMON ERRORS TO AVOID

1. Short Distance travel versus Long Distance Travel:

Long-distance travel is any travel equal to or above 101 km one way BETWEEN the main transportation hub at the event venue and return. (see Article A1-3.1.3.2).

- ⇒ If the distance is less or equal to 100 km one way: transport to and from a main transportation hub (meaning an airport, harbour, main train or bus station) is **covered by the DA**.
- ⇒ If the travel distance from point of departure to meeting venue is ≥ 101 km, it is a **long distance travel**.

By default, each individual receipt shall be encoded separately if the participant used different means of travel with the saved map as a justification proving the expense eligibility (i.e. travel expenses of different means of travel (plane & bus tickets; train & plane tickets; bus & train tickets) should be encoded separately, with their respective map).

2. Mismatch between the currency in the supportive documents and the currency selected by the participant in e-COST.

The currency selected in e-COST must match the currency on the supportive document: ticket or invoice:

- ⇒ Example: flight ticket in HUF, but the participant selects EUR in e-COST. Conversion done outside e-COST.



⇒ If the conversion HUF to EUR is indicated on the invoice, then claiming the amount in EUR is perfectly fine.

3. Rebooking tickets and eligibility:

Please note that **only the initial ticket is eligible for reimbursement**. Therefore, copy of the initially purchased flight ticket (booking confirmation) along with copy of the additional ticket (booking confirmation) must be uploaded under the claim.

SPECIFIC CASES:

- **Purchased package hotel with flight:** Please provide a breakdown of the expenses and adjust the cost of the flight ticket according to the invoice breakdown.
- **Interrail Pass, abonnement or monthly subscription for domestic trains are NOT eligible.**
- **Combined travel by ferry & car.**
 - ⇒ Ferry is eligible based on the face value receipt.
 - ⇒ Travel by car is eligible only 50% based on the google map proof of distance.

Travel by car:

For the travel by car for equal or above 300 km, it is **mandatory to upload copy of the hotel invoice**. Booking confirmation is NOT acceptable!

CASE 1: Travel by car equal to or more than 301 KM one way			
Scenario	Are accommodation invoice & proof of payment provided?	Daily Allowance	Reimburse the use of car?
1. Using car only: starts travel on the day before and ends the day of/after the meeting date/s	Yes	Yes	Yes
	No	Reimburse DA only for the dates signed on the attendance list	No
2. Using car + plane, train, bus or ferry : starts travel the day before and ends the day of/after the meeting date/s	Yes	Yes	Yes
	No	Yes, according to travel dates as shown on the e-ticket, train, bus or ferry tickets	No

CASE 2: Travel by car less than 301 KM one way			
Scenario	Are supporting documents provided? (accommodation or meal invoices)	Daily Allowance	Reimburse the use of car?
1. Using car only: starts travel on the day before and ends the day after the meeting date/s	Yes	Yes	Yes
	No	Reimburse DA only for the dates signed on the attendance list	Yes
2. Using car + plane, train, bus or ferry : starts travel the day before and ends the day after the meeting date/s	Yes	Yes	Yes
	No	Yes, according to travel dates as shown on the e-ticket, train, bus or ferry tickets	Yes

Claims with only DA

For **participants who live less or equal than 100km away from the meeting location**, they can claim the DA for the meeting days attended with no further justification required.

However, if participants claim DA corresponding to the **day before and/or the day after the event** without supporting documents to attest to the travel date/s, the participant will have to provide **receipts for accommodation or meals**.

In the absence of supporting documents, only the DA corresponding to the meeting/Training School dates for which the participant signed the attendance list can be reimbursed.

- **Example:** meeting dates 14-15 April The participant claims the DA on the day before the event 13/04 and/or on the day after the event 16/04, without receipts.

The participant will be requested by the GH Manager for supportive documents (**hotel invoice or meal receipts**).

In case of no supportive documents, the travel dates will be adjusted as if the participant had travelled on the meeting days (14-15) to be eligible for the DA only for these days, assuming the participant has signed the attendance list for both days.

Co-located activities & risk of DA exceeding 100%

GENERAL RULE: Double funding must be avoided.

Meeting (CG, MC)/Workshop/Conference + Training School

- Participants are expected to claim reimbursement of travel expenses via **one single Online Travel Reimbursement Request (OTRR)** as well as request reimbursement of daily allowance via the respective OTRRs for each of the events.
- However, the **supporting travel documents must be uploaded under both OTRRs** (the meeting and the Training school).
- To avoid double funding of the daily allowance in overlapping days, participants should correctly encode the travel dates and hours as explained in the example below so the total DA does not exceed 100%.

Example: for 2nd Purple Week: co-located Training School on 15-17 April and Meeting (Workshop+MC meeting) taking place on 18-19 April, the travel dates and hours are required to be encoded as follows:

Training School 15-17 April

When did you ARRIVE back home? The answer will be 18 April at 11:00 > the daily allowance will be calculated as 20% * daily allowance rate.

Meeting 18-19 April

When did you LEAVE home? The answer will be 18 April at 20:00 > the daily allowance will be calculated as 80% * daily allowance rate.

The total DA for the day 18/04 shall not exceed 100%.

Meeting/TS + STSM

If an STSM grantee is invited to Meeting or a Training School within the STSM period and decides to go, then **only the long distance travel to the Meeting or Training School may be reimbursed and nothing more.**

- For co-located STSM and meeting/TS, if both happen in the same city, the DA for the meeting/training school shall **not be claimed** by the participant.
- If the STSM and the meeting/TS are in different countries, the participant may claim **40% of the DA** in the meeting/TS.

Attending another COST Action event back-to-back

The same applies for participants attending another COST Action event, back to back to a PurpleGain event.



In this case **the participant must mention the Action reference (CA2XXXX) in the comment section of the OTRR.**

If the participant does not notify the participation in another COST Action event and this case is spotted during the monitoring period by COST, the participant will be requested to refund the GH Institution for the excess amount paid.

“Other travel expenses”

Any travel expenses encoded under “**Other Travel Expenses**” will be rejected and reassigned under the “**Travel Expenses**” category with the respective map proving that the **distance is above 100 km** to justify the eligibility.

Sickness during a face-to-face event

If the participant is sick during a face-to-face event and does not attend one of the days, to be eligible for the DA for that day, the participant must **provide with a medical certificate**. Otherwise, the DA for that day is NOT eligible.

LOCAL ORGANISER RESPONSIBILITY:

Face-to-face events

Participants must sign the attendance list generated from e-COST. No signature, no daily allowance will be eligible! In addition, the participant will **not be considered in the LOS grant calculation for that specific day**, which could result in a decrease in the LOS.

For any face-to-face event, the Local Organizer is responsible for making regular announcements during the coffee/lunch breaks **each day** about **signing the COST Attendance List**.

Virtual events and/or online participation to hybrid events:

- The participants shall receive an invitation with the tag “**not eligible for reimbursement**”. Therefore, they are not entitled to any reimbursement.
- The **Local Organiser** will have to **generate the attendance log/report from Zoom, Teams** or any other virtual tool used for the event and send it to the GHM after the event. **Screenshots from the Zoom or Teams platform are not acceptable!**
- **Virtual participants must have their actual names displayed to ensure an accurate check of the attendance** of those invited.



Hybrid events:

- The **Local Organiser** will have to **generate the attendance log/report from Zoom, Teams** or any other virtual tool used for the event and send it to the GHM after the event. **Screenshots from the Zoom or Teams platform are not acceptable!**
- The **Local Organiser** must also send the GHM the signed attendance list.

LOCAL ORGANISER SUPPORT GRANT

- **The Local Organisers can claim either the maximum grant amount as per the table in pg.91 of the Annotated Rules or less if this is their decision.**
- **VAT is NOT eligible.**
- **Local Organisers are responsible to comply with their national, institutional financial and legal rules in terms of grants' payments.** Therefore, they must keep any **invoices** that might be requested by these rules for internal audit of the LO institutions. This includes **TIMESHEETS** when the LOS has been allocated for admin & technical support. The GH Institution is entitled to claim these invoices and supportive documents at any time.

⇒ The document(s) must mention:

- **The event details (Action & meeting details & duration) the name of the person performing the tasks.**
- **a description of the work performed**
- **the hourly/daily rate**
- **the total number of hours worked**
- **the total amount**
- **be signed by a person with financial/legal authority of the institution (ex. *head of department, financial representative, etc*)**
- **be on the letterhead of the institution**

If you require any further information, please do not hesitate to get in contact with your GH Manager (ana.gomez.rojo@urjc.es).