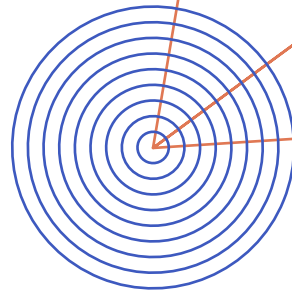


# NETWORKING TOOLS CHECKLISTS

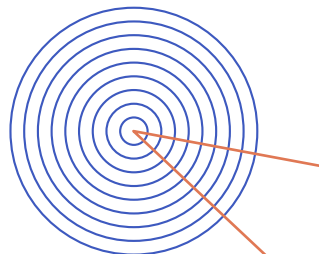


September 2022



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# 1. MEETING / TRAINING SCHOOL

## Principles:

- **Check** the eligibility of the participants according to any specific communication sent by the COST Association and to the [Annotated Rules for COST Actions](#).
- **Delete** any event which did not take place.
- **Delete** any pending claim older than **45** days
- **In case of a derogation**, the COST approval must be uploaded under the relevant claim in e-COST.
- **No derogations** for additional meals and/or nights, or long-distance travel above a total of EUR 1500 will be considered.

### LONG-DISTANCE TRAVEL:

- all long-distance travel receipts are uploaded under each travel claim.
- the amounts claim under each long-distance travel match the supporting documents.
- the supporting documents clearly detail the name of the service provider, the mode of transport taken, the full price paid for the ticket, the travel dates, the departure and arrival times and the name of the passenger when applicable.

### DAILY ALLOWANCE:

- In the cases when the travel dates **before and / or after the event** cannot be determined, another supporting document attesting the travel dates must be uploaded in e-COST for the accurate calculation of the daily allowance. Eg. a hotel booking / invoice, or a parking receipt, etc.

*\*Otherwise only the daily allowance corresponding to the days on which the participant signed the attendance list can be reimbursed.*

### NON-ELIGIBLE AMOUNT:

#### The following must be deleted from e-COST:

- all short distance travel expenses up to 100 kilometres one way
- meals and nights in addition to the daily allowance
- taxi, parking, car rental, fuel, tolls
- 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

*\*Supporting documents for non-eligible items uploaded in e-COST may remain if the Grant Holder Institute requires proof. Be aware that Grant Holders do not have access to the Grant Period once this has ended. To access these supporting documents, it is advisable that the Grant Holders download them for their own records.*

### CO-LOCATED EVENTS:

#### Check that:

- attendees in both events did not receive double reimbursement for the same event date.
- the daily allowance does not exceed 100% in e-COST on any of the days.
- the travel expenses are claimed only once - either in the meeting or in the training school.
- there is no double funding with a grant for the same period as the meeting and/or training school.

### ATTENDANCE LIST & MINUTES:

- Indicate in e-COST in the section "Review attendance" the actual participants.
- Upload the signed attendance list of each meeting / training school.
- *In case of a **virtual** event, upload the attendance log of the system.*
- *In case of a **hybrid** event, upload the signed attendance list + the attendance log of the system.*
- The attendance list must be checked for the individual OTRR (signature for each day) and for the **unique** participants (for the LOS).
- Ensure that the MC / Core Group minutes are uploaded under the e-COST section "Supporting documents" and they correspond to the specific meeting.

*\*Virtual participants must have their **actual names** displayed to ensure an accurate check of the attendance of those invited.*

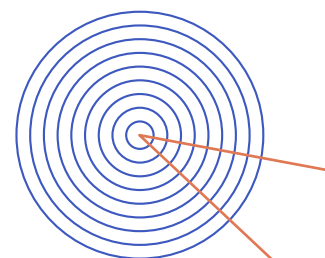


## 2. LOCAL ORGANISER SUPPORT

### Principles:

- **Check** the eligibility of the local organiser according to the [Annotated Rules for COST Actions.](#)
- **Delete** any pending claim older than **45** days

- Ensure that the signed **attendance** list for face-to-face events and/or an attendance log for virtual and hybrid events are uploaded.
- Check that the Local Organiser Support is paid to an **institution** bank account.
- Check the attendance list to ensure that the grant calculation matches the total number of **unique** participants.



## 3. GRANTS

### Principles:

- **Check** the eligibility of the grantee according to the [Annotated Rules for COST Actions](#).
- **Verify** that each of the uploaded supporting documents are associated to the specific grant, grantee, and respective conference and are not empty or incomplete files.
- **No proof of payment or of registration fee** should be requested for any of the grants to match the amount granted.
- **Delete** any event which did not take place.

### 3.1. Short Term Scientific Mission

- Check that the **host** organization is located in a **different country** than the country of the grantee.
- Make sure that all supporting **documents** are uploaded in e-COST according to the [Annotated Rules for COST Actions](#)
  - application
  - host confirmation of grantee acceptance
  - report
- Ensure the grant does not exceed the maximum amount of **EUR 4000**

### 3.2. Virtual Mobility Grant

- Make sure that all supporting **documents** are uploaded in e-COST according to the [Annotated Rules for COST Actions](#)
  - application
  - report
- Ensure the grant does not exceed the maximum amount of **EUR 1500**
- Ensure that there is no duplication with other networking or support tools.\*  
*\*e.g. A VM grant is awarded to set up a website while a separate invoice is claimed under Dissemination for website setup costs. This is double funding.*
- if not explicitly mentioned in the report, you should ask for proof of the work done\*  
*\*e.g. minutes of the meeting, draft publication, website, survey, or questionnaire results, etc.*
- If the grant report mentions the results, no proof needs to be requested.

### 3.3. ITC Conference Grant

- Check that the conference is organised by a **third party and not the Action**.
- Make sure that all supporting **documents** are uploaded in e-COST according to the [Annotated Rules for COST Actions](#), and the documents correspond to the grantee, and not someone else.
  - application
  - acceptance letter
  - abstract
  - report
  - certificate of attendance
  - programme
  - presentation (oral or poster)

- Ensure the grant does not exceed the maximum amount of :
  - **EUR 2000** per grant for face-to-face conferences,
- Or
- **EUR 500** for virtual conferences.
- If the event was initially scheduled as face-to-face, but it changed to virtual or if there are any other discrepancies related to the grant, the Grant Holder must must inform the Administrative Officer of the Action and provide a justification. COST will then assess each ITC Conference Grant in case the amount needs to be reduced a posteriori.

### 3.4. Dissemination Grant

- Check that the conference is organised by a **third party and not the Action.**
- Ensure that all supporting **documents** are uploaded in e-COST according to the [Annotated Rules for COST Actions](#) and the documents correspond to the grantee, and not someone else.
  - application
  - acceptance letter
  - abstract
  - report
  - certificate of attendance
  - programme
  - oral presentation
- Ensure the grant does not exceed the maximum amount of :
  - **EUR 2000** per grant for face-to-face conferences,
- Or
- **EUR 500** for virtual conferences.
- If the event was initially scheduled as face-to-face, but it changed to virtual or if there are any other discrepancies related to the grant, the Grant Holder must must inform the Administrative Officer of the Action and provide a justification. COST will then assess each Dissemination Grant in case the amount needs to be reduced a posteriori.

### 3.5. Virtual Networking Support (VNS)

- Make sure that all supporting documents are uploaded in e-COST according to the [Annotated Rules for COST Actions](#) and the documents correspond to the grantee, and not someone else.
  - virtual network strategy
  - report
- Check the grant application does correspond to the report uploaded.

## 4. DISSEMINATION

### Principles:

- **Check** the eligibility of the expenses according to the [Annotated Rules for COST Actions](#).
- **Ensure** that invoices are provided for each Dissemination product claimed.
- **Delete** any Dissemination item which did not take place.
- **For amounts over EUR 30.000** COST may request, for audit purposes, offers and proof that the procurement process was followed.
- **Amount** encoded in e-COST must exclude VAT.
- **Any dissemination** item should be **accepted for publication and invoiced** during the running Grant Period.
- **Ensure** that a **proof of delivery** of the publications, website, videos, etc. (in electronic format, pdf, link, DOI, etc.) is uploaded in e-COST. *For items accepted for publication, ensure the proof of acceptance is uploaded in e-COST e.g. acceptance letter from publisher.*
- **Ensure** that the COST acknowledgement is implemented according to the visual identity (<https://www.cost.eu/visual-identity>).
- **For all** items in currencies different than EUR: verify and upload in e-COST the conversion rates

### The uploaded INVOICE must include:

- **An invoice number and date.** A Proforma/intermediate invoice is not acceptable.
- **Addressee.** The invoice must be addressed to the Institution requesting the goods/services (not COST).
- **A description of the goods/services paid for in accordance with the order made.** Eg. CD ordered, CD paid for.
- **Breakdown of costs and charges.** A list of amounts without indicating for what product/service they are for is not sufficient.
- **VAT amount.** In case of VAT exemption, this must be mentioned on the invoice.
- **Total amount due.**

### Please note that for Dissemination products not yet published:

- If the publication is finished, accepted by the publisher, invoiced and it fulfils all COST rules concerning branding and acknowledgment, it can be accepted in the FR.
- If the publication is in the phase 'accepted for publication (or in press)', a pdf of the accepted manuscript + the proof of acceptance from the publisher must be uploaded in e-COST
- A publication in phase 'published' requires a pdf of the final manuscript to be uploaded in e-COST
- An acceptance letter from the publisher or accepted publication full text should be provided from the publisher's website or in pdf with the publisher's header.
- Publications with up to 2 year waiting period cannot be considered eligible.

### WEBSITE:

- Check that the total amount for the Action does not exceed a maximum of **EUR 12.000 for the entire lifetime** of the Action
- Check that the amount for the logo / graphic design does not exceed **1000 EUR**.
- If the website is provided by university/private person, invoices for an external contractor or **time sheets** for an in-house developer must be provided.

### The document(s) must mention:

- 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\*  
*\*e.g. head of department, financial representative, etc*
- be on the letterhead of the institution
- is encoded in e-COST and appears in the FR

## 5. Other Expenses Related to Scientific Activities (OERSA)

### Principles:

- **Check** the eligibility of the expenses according to the [Annotated Rules for COST Actions](#).
- **Ensure** that invoices are provided for each OERSA item claimed.
- **Delete** any OERSA item which did not take place.
- **For amounts over EUR 30.000** the COST Association may request, for audit purposes, offers and proof that the Grant Holder procurement process was followed.
- **Amount** encoded in e-COST must exclude VAT.

#### **BANK CHARGES:**

- Ensure that actual bank statements are uploaded (no screen shorts from accounting or excel files will be accepted)
- Ensure that the total sum of the individual bank charges amounts matches with the amount claimed in e-COST

#### **VIRTUAL COMMUNICATION AND COLLABORATION TOOLS**

- Check the **invoice (see Dissemination for info on invoice)**
- Ensure that the total amount does not exceed a maximum **EUR 500** until end of Grant Period.
- In case of an annual subscription, only the months related to the current Grant Period can be claimed (calculated pro-rata per month).

*e.g. subscription take for 500 EUR for period Jan – Dec 2022. Only EUR 416.66 can be claimed corresponding to the pro-rated eligible period of Jan – Oct 2022 when the Grant Period ends.*

#### **CONSUMABLES, RENTING OF EQUIPMENT, SHORT-TERM USE OF SOFTWARE & DATABASE LICENCES:**

- Check the invoice (see Dissemination for info on invoice):
- Strictly eligible if these costs are associated with an existing Training School encoded in e-COST. (A stand-alone claim for these items is not eligible.)

#### **SHIPPING COSTS:**

- Check the invoice (see Dissemination for info on invoice):
- Ensure the costs are associated with an existing event or dissemination product encoded in e-COST. (A stand-alone claim for these items is not eligible.)
- Ensure the distribution list is encoded and traceable to the encoded COST event. (e.g. event is in Brussels, but the items were shipped to Denmark – not eligible)



## 6. Intermediate or Final Financial Report

### ■ Intermediate Financial Report (IFR).

Check that the forecast is updated:

- events older than 45 days are deleted

### ■ Final Financial Report (FFR).

All payments must be recorded :

- all accruals must be zero
- forecast must be zero

### **Please note that:**

You need to ensure that :

- items appearing in e-COST under Dissemination and OERSA with an end date before the end of Grant Period actually appear in the FFR.
- items with invoices dated before or after Grant Period appear in the FFR.

*e.g. FFR submitted on 1 October should include all encoded Dissemination and OERSA items*