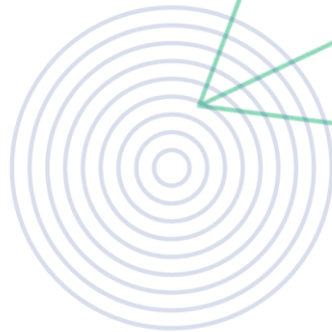


Networking tools checklists for Grant Holder Managers



November 2024

CONTENTS

1. Meeting / Training School.....	3
2. Local Organiser Support	5
3. Networking Activities Organised Through A Grant Awarding Process	6
3.1. Short Term Scientific Mission	6
3.2. Virtual Mobility Grant	6
3.3. ITC / Young Researcher or Innovator/ Dissemination Conference Grant.....	7
4. Dissemination & Communication products.....	8
5. Expenses Incurred For The Benefit Of The Network.....	10
5.1. Other Expenses Related to Scientific Activities (OERSA).....	10
5.2. Virtual Networking Support (VNS)	10
6. Financial reporting.....	11
6.1. Intermediate Financial Report.....	11
6.2. Financial Report	11

1. MEETING / TRAINING SCHOOL

Principles:

- Check the **eligibility** of the participants according to any specific communication sent by the COST Association and the [Annotated Rules for COST Actions](#) (Annex 1. Networking Activities Organised Through Action Events)
- Delete:
 - any event which did not take place.
 - any pending claim older than 45 days.
 - any ineligible expenses (all short distance travel expenses, meals, and nights in addition to the daily allowance, any incidental costs, charges and/or penalties linked to a participant changing or having to rebook travel tickets, medical / health / property insurance, medical test, long-distance travel expenses exceeding EUR 1500).
- In case of a derogation, request in advance to the AO the derogation approval, in line with the [Derogation Guidelines](#). Upload the COST approval under the relevant claim in e-COST.
- No derogations for additional meals and/or nights, or long-distance travel above a total of EUR 1.500 will be considered.

ATTENDANCE LIST:

- Verify that the participants indicated in e-COST in the section “Review attendance” match the participants who signed the attendance list.
- Check the attendance list for the individual OTRR (signature for each day) and for the **unique** participants (for the LOS).
- 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 **online** 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.*

**It is recommended that online participants have their actual names displayed to ensure an accurate check of the attendance of those invited. GH are recommended to upload an online presence log with 2 tabs: 1 tab displaying the raw information, 1 tab with the clean information to ensure an easy check of the attendance.*

MINUTES:

- Upload the MC / Core Group minutes under the e-COST section “Supporting documents” and ensure they correspond to the specific meeting.

LONG-DISTANCE TRAVEL:

Check that:

- copies of all long-distance travel receipts are uploaded under each travel claim. Print screens or partial documents are not accepted.
- the amounts claim under each long-distance travel match the supporting documents and are encoded in the currency of the invoice. Au automatic calculation into EUR is done in e-COST.
- the supporting documents clearly detail the name of the service provider, the full price paid for the ticket, the travel itinerary including travel dates and hours, the departure and arrival city, and the name of the passenger when applicable.

DAILY ALLOWANCE:

Check that:

- the participant signed the attendance list for each day of the event for which (s)he was invited.

- copies of all long-distance travel receipts are uploaded under each travel claim. In the cases when the travel dates before and / or after the event cannot be determined, the duration of the start or return journey(s) shall be increased for the purpose of calculating the daily allowance, by a fixed period of 2 hours.

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

NON-ELIGIBLE AMOUNTS:

- Delete from e-COST all expenses under section A1-3.1.4 Non Eligible Travel Expenses of the Annotated Rules

**Supporting documents for non-eligible items uploaded in e-COST may remain if the Grant Holder Institute requires proof. However, 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 reimbursement for the same event date. This constitutes double funding and it is not permitted. It is advisable that participants also declare/add information in e-COST in the 'Justification' section of their reimbursement claim if they are attending more than 1 event (even in different Cost Actions).
- 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.

**For STSMs overlapping with a meeting/TS, please refer to the recommendation section in the Annotated Rules – A1-3.1.3.1 Accommodation, Meals, And Short Distance Travel Expenses – Daily Allowance.*

2. LOCAL ORGANISER SUPPORT

Principles:

- Check the eligibility of the local organiser according to page 60 of the Annotated Rules for COST Actions.
- Delete any pending claim older than 45 days.
- Ensure there is no double funding in case of collocated activities (a single LOS is afforded to collocated meetings. For TS, a separate LOS grant can be requested.)
- In case a f2f event needs to take place online, change the type of LOS grant accordingly.

Ensure that:

- the correct meeting type (Face to Face / Hybrid / Online) is encoded in e-COST under the section 'Meeting details'.
- the signed attendance list for face-to-face events and/or an attendance log for online and hybrid events are uploaded in e-COST.
 - Face-to-Face meeting -> 2 checks:
 1. Signed attendance list is uploaded
 2. Ensure that the names of signatories on the signed attendance list match with the names on the 'Review attendance' section
 - On-line meeting with LOS – verify that the number of unique participants is in proportional to the LOS grant awarded
 - On-line meeting without LOS – verify that the attendance log is uploaded
 - Hybrid meeting -> 3 checks:
 1. Signed attendance list is uploaded
 2. Ensure that the names of signatories on the signed attendance list match with the names on the 'Review attendance' section
 3. Verify that the number of unique participants is in proportional to the LOS grant awarded
- the Local Organiser Support grant is paid to an institution bank account and never into a personal bank account.
- the grant calculation matches the total number of unique participants who were invited on e-COST .

3. NETWORKING ACTIVITIES ORGANISED THROUGH A GRANT AWARDING PROCESS

Principles:

- Check the **eligibility** of the grantee according to the [Annotated Rules for COST Actions](#).
- Verify that each of the uploaded supported documents are associated to the specific grant, grantee, and respective conference and are not empty or incomplete files.
- 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.

- application
- host confirmation of grantee acceptance
- report

Ensure the grant does not exceed the maximum amount of **EUR 4.000**.

3.2. Virtual Mobility Grant

Make sure that all supporting **documents** are uploaded in e-COST.

- application
- report detailing the work done. If not explicitly mentioned in the report, ask for **proof of the work** done (eg. minutes of the meeting, draft publication, website, survey, or questionnaire results, etc). If the grant report mentions the results, no proof need be requested.

Ensure the grant does not exceed the maximum amount of **EUR 1.500**.

Ensure that there is no duplication with other networking or support tools.

Eg. 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.

3.3. ITC / Young Researcher or Innovator/ Dissemination 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 and the documents correspond to the grantee:

- application
- copy of the abstract of:
 - the accepted poster or oral presentation for YRCG;
 - the accepted oral presentation for ITCCG;
 - the accepted oral presentation focused on promoting the scientific achievements and activities being performed by the COST Action for the DCCG.
- the acceptance or invitation letter from the conference organisers
- certificate of attendance
- programme of the conference or book of abstracts / proceedings indicating the oral presentation of the grantee
- copy of the given presentation (poster for YRICG)
- report

If the event was initially scheduled as face-to-face, but it changed to online or if there are any other discrepancies related to the grant, the Grant Holder 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.

Ensure the grant does not exceed a maximum amount of:

- **EUR 2.500** per grant for face-to-face conferences,
- Or
- **EUR 500** for an online conferences.

4. DISSEMINATION & COMMUNICATION PRODUCTS

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.
- Amount encoded in e-COST must exclude VAT.
- 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.
- 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 the 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.

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. It is recommended that the Action number and title be indicated on the invoice..
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

WEBSITE & LOGO:

Check that the total amount for the Action does not exceed a maximum of **EUR 12.000 for the entire lifetime** of the Action

If the website is provided by university/private person, invoices for an external contractor or time sheets for an in-house developer are provided.

Check that the amount for the logo / graphic design does not exceed **1.000 EUR**

Check that the name of the Supplier/Publisher **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 (*eg. head of department, financial representative, etc*)
- be on the letterhead of the institution

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 (eg. acceptance letter from publisher).

For all items in currencies different than EUR: verify and upload in e-COST the conversion rates used.

5. EXPENSES INCURRED FOR THE BENEFIT OF THE NETWORK

5.1. 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 match 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)

Eg. 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 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. (*eg. event is in Brussels, but the items were shipped to Denmark – not eligible*)

5.2. Virtual Networking Support (VNS)

Make sure that all supporting documents are uploaded in e-COST and the documents correspond to the grantee, and not someone else.

- virtual network strategy
- report

Ensure the grant does not exceed the maximum amount of EUR 4000 per Grant Period

6. FINANCIAL REPORTING

6.1. Intermediate Financial Report

Before submitting, check that:

- the report is submitted if cash is required and no later than 2 months before the end date of the Grant Period.
- the forecast is updated.
- events older than 45 days are deleted.

6.2. Financial Report

Before submitting, check that:

- all payments are recorded.
- all accruals must be zero.
- forecast must be zero.
- 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.

Eg. FFR submitted on 1 October should include all encoded Dissemination and OERSA items.