Local Organiser Support (LOS)
User Guide

Version – 2016-1-12

Local Organiser Support (LOS)

1.1. Process flow

This document describes the process of creating an LOS grant which is started by the Action stakeholder. It is necessary to separate the process in 2 parts: one describes the step to be performed before the meeting and another the steps to be performed after the meeting.
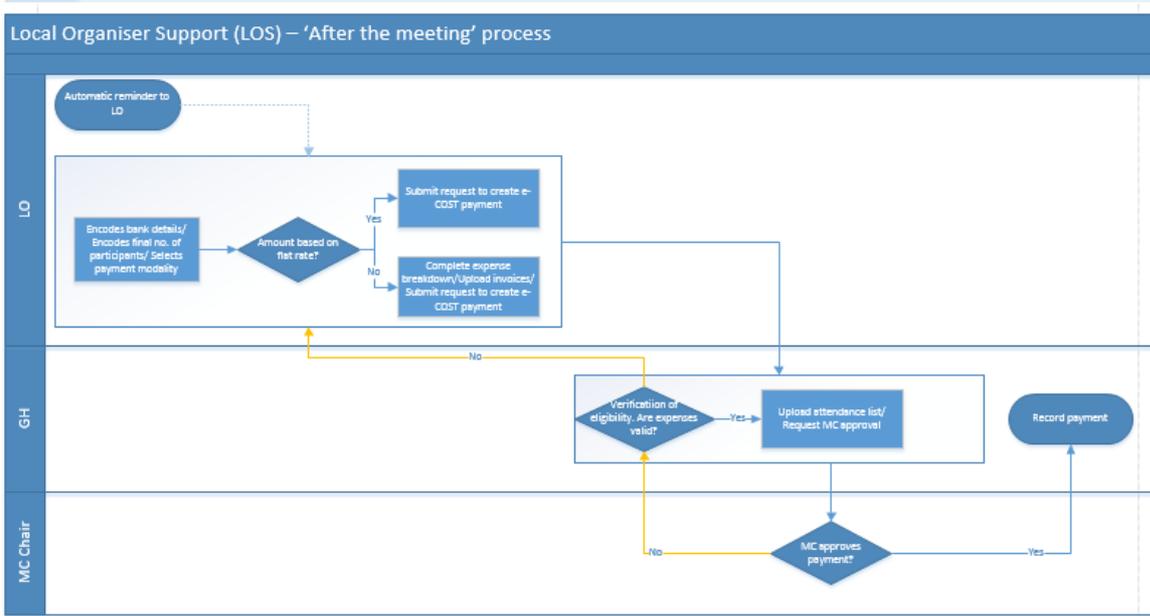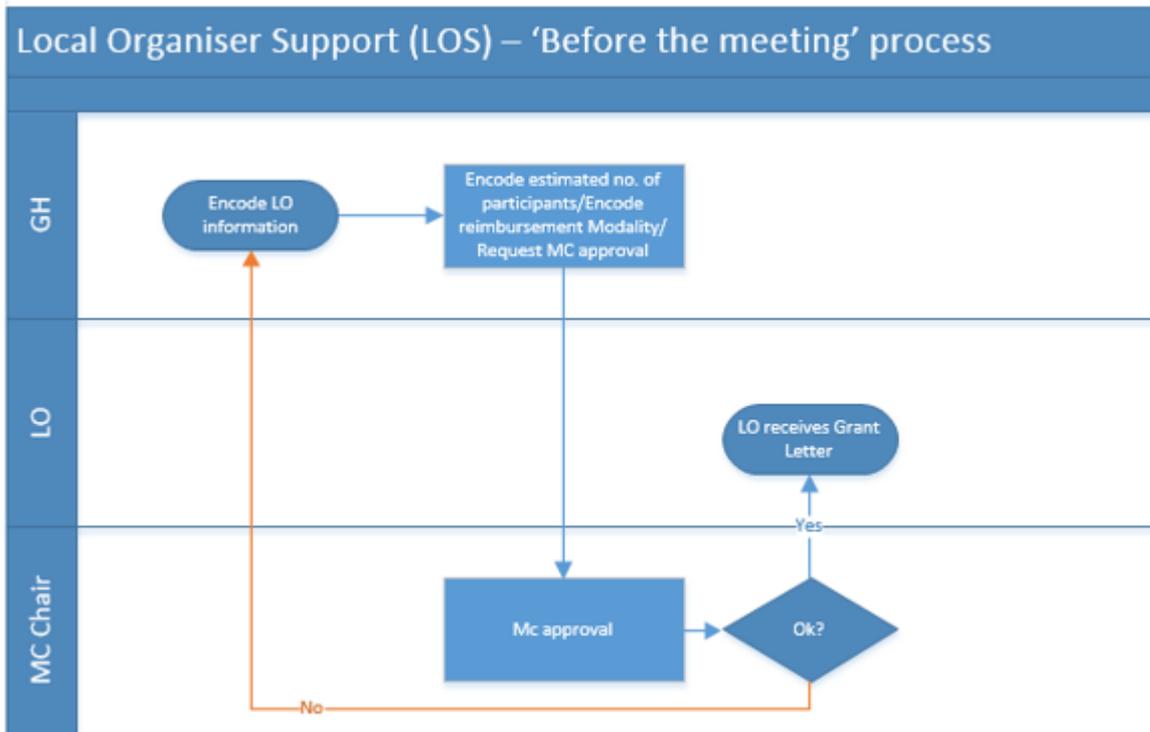
1.2. Process overview

1.2.1 The Grant Holder (GH) encodeds the Local Organiser's details

The GH encodes the details of the Local Organiser (LO) either by manually entering them or by using the Look- up button. The GH ticks the box "The LO will apply for a support grant" . If the GH wishes to cancel the LOS and remove the entire data at any point in time, the GH can simply un-tick the box "The LO will apply for a support grant".

Figure 1:

1.2.2 The GH requests the MC pre-approval based on an estimated number of participants and grant amount

The GH:
a) enters the estimated number of participants. The final number will be confirmed after the event.
b) chooses one of the two payments method,

If the GH selects option 1 (flat rate), then the amount of the grant is automatically calculated and up to a maximum of EUR 5 000.
If the GH selects option 2, then the GH manually enters an amount in euro up to EUR 10.000.
The LO will have the opportunity to confirm the payment method after the event.
c) requests the MC approval.

An email notification with a link to the LOS is sent via e-cost to the MC Chair or Vice-Chair (the latter in cases when the LO is also the chair).

Figure 2:

Local Organiser Support (LOS)

a. Please enter below the estimated number of participants:

	Day 1	Day 2	Day 3	Total
Estimated number of participants	5	10	10	25

b. Please specify the preferred reimbursement modality to determine the basis for calculating the LOS grant:

○ Flat rate of EUR 20/day/participant (maximum contribution allowed EUR 5000)   500.00

◉ In cases where the LO requests an amount different than the flat rate, please enter an amount in euro.   3100

[Save]

> The GH can always see what the grant based on the flat rate would be, even if option 2 is selected.

1.2.3 The MC Chair/Vice-chair approves or rejects the LOS application

The MC chair/ vice-chair can approve or reject the application by clicking on the link in the e-notification received after the GH entered all details of the LOS.

a) If the application is approved, the **LO** will receive the grant notification as pdf attachment (Figure 4)
b) If the application is rejected, the **GH** will receive a notification with the MC Chair/Vice-Chair's comments and will be able to resubmit the LOS application for pre-approval.

Figure 3:

Local Organiser Support (LOS)

Meeting Title: All WGs meeting "Strategic research agenda"
Meeting Type: Core Group Meeting, Working Group Meeting, Workshops/Conferences, Other COST relevant meeting
Meeting Dates: Wednesday, March 16, 2016 to Friday, March 18, 2016
Meeting Venue:
Local Organiser Institution:

FORECAST

	Day 1	Day 2	Day 3	Total
Number of participants	5	10	10	25
Grant amount up to				3100

Status: *Forecasted grant pending MC approval*

Comments:

[Approve]   [Reject]

Figure 4 - The Grant Notification letter that the LO receives once the Mc approves the LOS

Dear

With reference to your application for a Local Organiser Support grant, I am pleased to notify you that the Management Committee (MC) of COST Action   has awarded a grant of up to 3,100.00 EUR as a contribution to the logistics of the aforementioned event.

The funding must be spent according to the rules for "Local Organiser Support" that can be found on http://www.cost.eu/Vademecum.

The payment of this grant will be made after:

- the event has taken place,
- the Grant Holder has verified the eligibility of the claim (be aware that a final breakdown of expenses and supporting documents may be needed),
- and the MC has approved the final request

Kind regards,

1.2.1. Completion of the LOS claim by the LO after the event

After the event has taken place, the LO will receive 2 reminders 1 day and 25 days after the event, as in figure 5 below.

Figure 5

Dear Local Organiser,

This e-mail is to remind you that you haven't completed the steps related to the reimbursement of Local Organiser Support (LOS) grant following the below COST event:

Meeting Title: All group meeting - Policy Strategy
Meeting Type: Core Group meeting, Working Group meeting, Other COST relevant meeting
Meeting Dates: Wednesday, December 9, 2015 to Thursday, December 11, 2015
Meeting Venue: Technical University of Brussels

You are kindly asked to complete the following steps in order to submit your claim:

1. **Add the bank details of your institution** to your e-cost profile.
   To add the bank details, please:
   - log into https://e-services.cost.eu
   - Click on the tab 'Profile', then on 'Bank accounts', 'Add bank accounts', select as 'Type of the account': 'Institution'.

   If you had previously entered the bank details of your institution in your e-cost profile, please proceed to step 2.

2. Click on the link below before Saturday, January 9, 2016 in order to submit your claim in time. Please see section 6 "Local Organiser Support" of the Vademecum available on   http://www.cost.eu/Vademecum

http://qa-ecost-dev.cost.local/reimbursement/958811a3f9752148665a8538a5048831

Failure to submit your claim in time may result in the cancelation of the Local Organiser Support (LOS) grant.
Kind regards,

Grant Holder

In order to be able to submit an LOS claim, the LO must complete the following steps:

a) enter the bank details of his/her institute, as in figure 6 below. If the bank details of the institute are already in the system, they will be available in the drop-down list.

Figure 6

Local Organiser Reimbursement

Meeting Title: Small group meeting – Policy Brief No2
Meeting Type: Other COST relevant meeting
Meeting Dates: Wednesday, December 9, 2015 to Thursday, December 10, 2015
Meeting Venue: Technical University of Brussels, Belgium
Local Organiser Institution: Technical University of Brussels, Belgium

BANK DETAILS

-- Select An Institution Bank Account -- ⌄ Add/Edit accounts

b) complete the actual number of participants and confirm the preferred method of reimbursement, as in figure 7 below. The LO can change the initial method of reimbursement, as well as the amount. the example below shows that the LO decided to request 4.500 EUR instead of the pre-approved amount of 3.500€.

Figure 7

Local Organiser Reimbursement

Meeting Title: Small group meeting – Policy Brief No2
Meeting Type: Other COST relevant meeting
Meeting Dates: Wednesday, December 9, 2015 to Thursday, December 10, 2015
Meeting Venue: Technical University of Brussels, Belgium
Local Organiser Institution: Technical University of Brussels, Belgium

BANK DETAILS

-- Select An Institution Bank Account -- ⌄ Add/Edit accounts

Local Organiser Support (LOS)

Please enter below the number of participants who attended the event (based on the attendance list)

	Day 1	Day 2	Day 3	Total
Number of participants	5	10	10	25

Please specify the preferred reimbursement modality to determine the basis for calculating the LOS grant:

○ Flat rate of EUR 20/day/participant (maximum contribution allowed EUR 5000) [   ]

◉ In cases where the LO requests an amount different than the flat rate, please enter an amount in euro: [4500]

c) enter the expense breakdown, as in figure 8 below,

Figure 8

FINAL EXPENSE BREAKDOWN

Type of expenditure	COST support
Rental of Rooms and technical equipment	500
Administrative and secretarial expenses ⓘ	500
Phone, fax and mailing for announcements	0.00
Photocopying and the printing of programmes, book of abstracts, book of proceedings, flyers etc	0.00
Coffee breaks, light refreshments and light lunches ⓘ	900
One single networking dinner	2600
Scientifically justified field trip expenses	0.00
Consumables purchased for Training Schools ⓘ	0.00
Total	€ 4500

Instructions:

All amounts must be in EUR. For amounts in currencies other than the EUR, please convert them to EUR using InforEuro.

VAT is not an eligible expense.

Meals (light lunches and one networking dinner) can be reimbursed if deducted from the daily allowance of the eligible participants.

d) upload the invoices, as in figure 9 below.
e) submit his/her request to the GH. An email notification with a link to the LOS is sent via e-cost to the GH, as in figure 9 below.

Figure 9

Supporting Documents

Attached Document 1	Catering invoice, including dinner and coffee bre	Download	Delete

Title / Description	Room rental and admin expense invoice	*(Example: invoices, receipts, etc.)*	
File to upload	INVOICE 2.pdf	Browse	Upload	Cancel

The file will not be available until you click the Upload button.
You can upload files up to 2 MB each.
Supported file types are: pdf, xps, png, jpg, jpeg, gif.

[Save]   [Submit]

1.2.2. The GH checks and completes the LOS claim

The GH receives the notification that the LO has encoded the LOS grant and that (s)he needs to check and complete the LOS, as in figure 10 below.

Figure 10

Dear Grant Holder,

The Local Organiser of this event has submitted the Local Organiser Support (LOS) request.
You are kindly asked to review this request by clicking on the link below:

http://qa-ecost-dev.cost.local/ghs/1622/meetings/68429/editlo/

You are kindly asked to:

1. Verify that the actual number of participants who attended the aforementioned meeting corresponds to the attendance list
2. Upload the event attendance list in e-cost
3. Verify the eligibility of the expenses claimed by the Local Organiser. Please be reminded that VAT is not an eligible expense. Ineligible amounts must be deducted from the payable amount.

For a complete overview of the Local Organiser Support (LOS), please see the relevant section of the Vademecum

at http://www.cost.eu/Vademecum

Kind regards,

e-cost

The GH must:
   a) verify that the the actual number of participants entered by the LO corresponds to the attendance list,
   b) upload the attendance list of the event, as in figure 11 below
   c) request MC post-approval.

Figure 11

If the LO submitted his/her claim after the 30 day deadline, the GH has the option to reject the LOS. **This rejection effectively cancels the LOS,** as in Figure 12 below.

Figure 12

The deadline of 30 days for the Local Organiser to submit a grant request has passed. You can still process it and request the MC approval by clicking the button 'Request MC approval'. Alternatively, you can reject it by clicking the 'Reject LOS' button which will cancel the LOS grant.

You are about to cancel this LOS grant.

All information will be lost. Are you sure you want to proceed?

OK   Cancel
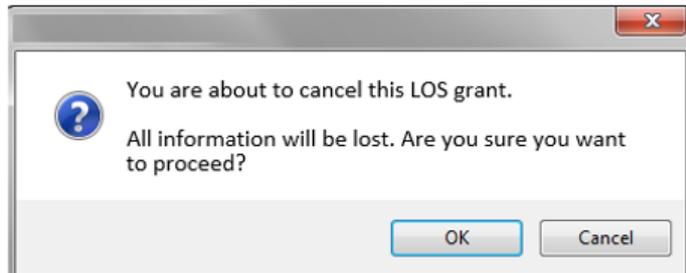
1.2.6 the MC Chair/Vice-Chair can approve or request more information on the LOS application

The MC chair/ vice-chair can approve or request additional information about the application by clicking on the link in the e-notification received after the GH finalised all steps related to the LOS.

Figure 13

Dear MC Chair,

Meeting Title: All group meeting
Meeting Type: Core-Group meeting, Working Group meeting, Other COST relevant meeting
Meeting Dates: Wednesday, December 9, 2015 to Thursday, December 11, 2015
Meeting Venue: Technical University of Brussels

The Grant Holder is requesting the MC approval for the Local Organiser Support (LOS) associated with this event.

Please approve or reject the budget application by clicking on the link below:
http://qa-ecost-dev.cost.local/action//instruments/68429

We thank you for your cooperation.

Kind regards,

Grant Holder

Figure 14

Status: *Claim pending MC approval*

Comments:

Approve | Request additional information

a) If the application is approved, the GH will receive a notification. The approval of the MC effectively **finalises the payment in e-cost**, as in Figure 15 below.

Figure 15

Dear Grant Holder,

Meeting Title: All group meeting
Meeting Type: Core-Group meeting, Working Group meeting, Other COST relevant meeting
Meeting Dates: Wednesday, December 9, 2015 to Thursday, December 11, 2015
Meeting Venue: Technical University of Brussels

On behalf of the Management Committee of the COST Action, the MC Chair of the Action has approved the request of Technical University of Brussels for a budget of 4 500.00 EUR to support the aforementioned event.

The LOS process is complete and can be sent for payment.

We thank you for your cooperation.

Kind regards,

MC Chair

b) If the application is not approved and more information is required, the **GH** will receive a notification with the MC Chair/Vice-Chair's comments and will be able to resubmit the LOS application for post-approval.

1.2.7 The GH can record the LOS payment

Once the MC approves the final LOS application, the GH can find the application under 'Claims' and record the payment which triggers an email notification with the payment details to the LO.

Figure 16

Meetings

[Action]

Start	End	City	Type†	Title	Participants*				Status**	L.O.S.‡	Options
					Forecast	Estimation	Claims	Payments			
Sep 16	Sep 18	Vienna	MC,CG,WG,W/C,DM	Second MC and WG meeting...	[30/39]	[38/38]	[38/38]	[35/38]	Partially paid	Yes ✏	📝 👥 📦 📁
Dec 09	Dec 10	Belgrade	OM	Small group meeting –...	[5/6]	[1/1]	[1/1]	[0/1]	TBR	Yes ✏	📝 👥 ❌ 📦 📁

Attendance list

Attached Document 1   [Attendance List]   [Download]

Claim Status: *Claim approved*

[Cancel LOS]   [Open Payment]