

# AGM

# **User Manual**

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#### **1. INTRODUCTION**

# 1.1. Definition

The AGM (A new Gateway to EU Meetings) website makes it easier to **organise expert meetings** at the Commission and **reimburse expenses**. The website is currently being tested on a **limited number** of expert groups and committees. If it's successful, AGM will be used for *all expert groups*.

AGM allows experts to:

- receive meeting invitations (including the meeting agenda and other info)
- confirm their attendance
- enter their bank account details
- Create and send their expenses claim electronically.

#### 1.2. Disclaimer

The information contained in this manual is for guidance only and is a description of how to use the AGM application. There are no guarantees as to the accuracy of the descriptions owing to the evolving nature of the system. In no way should this information be considered as replacing EU law or be viewed as the Commission's legal interpretation.

# 1.3. Using EU Login authentication

AGM uses the EU login as unique authentication method.

Check our FAQs on the <u>AGM portal</u> to see how to create your EU login account and how to reset your EU login password.

#### 2. ROLES OF USERS IN AGM

#### 2.1. Correspondent

As a correspondent you are the **contact point** for the member of the committee or expert group invited to a meeting. You will use AGM to tell the Commission the names of the **participants** in your delegation (people from your organisation who will attend the meeting).

You can draw up the list of participants outside AGM. When it's ready, you can enter it in the system.

You will receive an email containing the invitation, the agenda and other information about the meeting from the meeting organiser.

In the email, you'll also find a **link to AGM** that will grant you access as correspondent for the delegation.

Be careful who you share this link with – it grants anybody access as correspondent.

Using AGM, you need to enter each participant's details.

Once the list is finished, you should send it to the meeting organiser.

#### 2.1.1. Become a correspondent

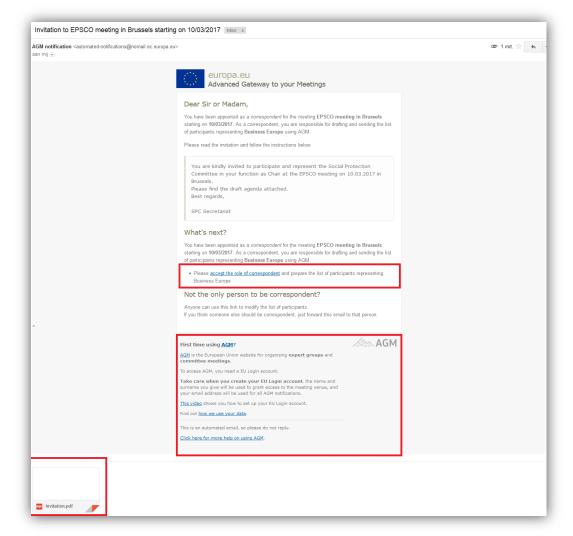
As mentioned above, you will receive an **email** containing the invitation and other info about the meeting and a link to AGM.

You can see below an example of an **invitation** sent to a correspondent. The email has two main parts:

1) The invitation with attachments;

2) Instructions on how to become a correspondent, and other links for more information.

You'll receive the invitation as an attachment, and you'll also be able to read the wording of the invitation in the body of the email.



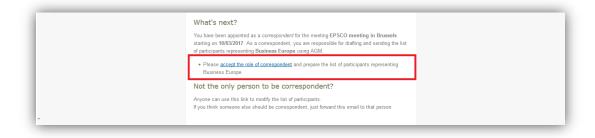
By clicking on this link you will become a correspondent for this meeting.

You will use your ECAS account to log in to AGM and the meeting details will be displayed. You can then enter the **list of participants**.

What's next?	
You have been appointed as a <i>correspondent</i> for the meeting EPSCO meeting in Brusse starting on 10/03/2017. As a correspondent, you are responsible for drafting and sending t of participants representing Business Europe using AGM.	
<ul> <li>Please accept the role of correspondent and prepare the list of participants representi Business Europe</li> </ul>	ng
Not the only person to be correspondent?	
Anyone can use this link to modify the list of participants. If you think someone else should be correspondent, just forward this email to that person.	
First time using AGM?	AGM
AGM is the European Union website for organising expert groups and committee meetings.	
To access AGM, you need a EU Login account.	
Take care when you create your EU Login account. the name and sumame you give will be used to grant access to the meeting venue, and your email address will be used for all AGM notifications.	
This video shows you how to set up your EU Login account.	
Find out how we use your data.	
This is an automated email, so please do not reply.	
Click here for more help on using AGM-	

All the links in the disclaimer text take you to the AGM website. There you'll find more information about AGM (FAQs, support contacts, etc.).

Click on the link in the email to become a **correspondent** for the meeting and to draw up the list of participants in AGM.



# 2.1.2. Prepare and send the participants list

As **correspondent** for a meeting, you need to send the **list of participants** in your delegation to the meeting organiser.

After you click on the link to become a correspondent, the following screen will appear:

About this site   Le	agal notice Contact us Cookies FAQ [English (en) ▼ John SMITH (john_smith_agm)
Commission	
European Commission > AGM Frontoffice > Invitation	
MEETINGS LIST / MEETING	
CONNECTIONS	
MEETING	
UNITED FOR THE FUTURE OF OUR PLANET	
Green planet	
CHARLEMAGNE-BRUSSEL 27/04/2015 (2 DAYS) PARTICIPANTS REQUIRED	
Navigation M	fenu
INVITATION PARTICIPANTS MESSAGES TIMELINE	
MEETING INVITATION	
Dear members of the Green Planet group,	Attachments
It is our pleasure to invite you to the next meeting of the Green Planet Group.	Agenda.pdf (84.2 kB)
The meeting will take place on the 27-28 April in Brussels at the European Commission premises, Charlemagne building.	bother.pdf (82.4 kB)
The meeting will start on 27 April at 12h30 and will end at 17h00, on 28 April at 9h00 and will end at 17h00 the latest.	
Please find the Agenda and other documents attached.	
Please be aware that you need to organize travel and accomodations yourself.	
May we ask you to communicate the name of the participant(s) through the AGM system by 30 March a the latest.	at
Kind regards,	
Green Planet Group Secretariat	
European Commission	

Here you can again see the **invitation text** and can access **related documents**. Use the '**Navigation Menu**' to access different menus in AGM. Click on '**Participants**' on the navigation menu.

Here you'll see **your name** as correspondent. If you see more than one name, it means that the invitation has been sent (or forwarded) to *other recipients who have accepted the correspondent role*.

**Please note**: only one correspondent can send the participants list – the first one to react.

Under the heading 'Delegation Participants' you have the option to send an empty list or add participants.

After you add the participants, they will appear in the delegation participants section.

The correspondent can add himself as participant clicking on 'Add as participant' and filling the mandatory information's, to complete click on update:

DELEGATION	ASSIGNMENTS			
L SPIELBERG, Stev	ven correspondent		Add a	s participant
DELEGATION	PARTICIPANTS		Ser	nd empty list
		nd send it to the organise ganiser by sending an en		vill attend
PARTICIPANT -	ORGANISATION	REPRESENTATION	EXPENSES CLAIM	COMING?
ADD PARTIC • from the last 5 meet	as a new p	articipant of this member	r -	
Select participant		T		

Edit participant	×
Representation level ③ Country ③ Other public body ③ EU Body ③ International organisation ⑤	Country (country represented) Ttaly
Public administration name <b>O</b>	
SPIELBERG, Steven Entitled to claim expenses	Coming? Yes No
	→ OUpdate Cancel

To add more participants select '*as a new participant of this member*' to invite a participant who never participated in a meeting using AGM, otherwise you can search by name the participant selecting '*from the last X meetings*'.

For a representation level as **public authority**, the country, other public body, EU body or international organisation is already filled by the meeting organisers, the correspondent can't modify it. If you represent a country, a region or a province, on the "Public administration name" field please enter the name of the organisational entity (ministry, department, etc.), if you represent an

organisation, please enter the name of organisation (an intergovernmental organisation, EU institution or body):

ADD PARTICIPANT	
○ from	t of this member
Representation level <b>0</b>	Country (country represented) 3
Country 3	Italy 💌
🔿 Other public body 🟮	
🕞 EU Body 🟮	
<ul> <li>International organisation 3</li> </ul>	
Public administration name 0	
First name	Last name
Email	Entitled to claim expenses
	Cancel Add

For a member with **private authority** as representation level, the correspondent can choose for every participant the detailed representation.

By selecting the representation level in their individual capacity and representing the interest of an organisation, the correspondent needs to select the Country:

PARTICIPANT 🔺	ORGANISATION	REPRESENTATION	EXPENSES CLAIM COMING?	
ADD PARTICIPANT				
◯ from the last 5 meetings ▼	as a new participant of this mer	nber		
Representation level 🟮		Country (country represented)		
In their individual capacity 3		Belgium		•
Representing a common interest o	f several countries 🕄			
Representing the interest of one c	rganisation 🛛			
First name		Last name		
Email		Entitled to claim expenses		
			Cancel Ac	dd

By selecting representing a common interest of several countries the correspondent needs to choose the scope the organisation is representing:

PARTICIPANT 🔺	ORGANISATION	REPRESENTATION	EXPENSES CLAIM	COMING?
ADD PARTICIPANT	as a new participant of this mer	nber		
Representation level 0		Scope 🟮		
💿 In their individual capacity 🕄		<ul> <li>European Union</li> </ul>		
<ul> <li>Representing a common interest of</li> </ul>	f several countries 🧕	EFTA		
Representing the interest of one of Organisation name	The organisation governed by a national law is representing the interests of population of several countries (for example international associations like Caritas Europa, ETUC, etc.)	<ul> <li>United Nations</li> <li>Other</li> </ul>		
First name		Last name		
Email		Entitled to claim expenses		
			c	Cancel Ad

To add more participants select '*as a new participant of this member*' to invite a participant who never participated in a meeting using AGM, otherwise you can search by name the participant selecting '*from the last X meetings*'.

The following screen will appear. Enter the details of the participants.

Complete all the fields.

Please note: the option 'Entitled to claim expenses' only applies to some participants.

Check the rules in the invitation to see how many participants can claim expenses.

Then click 'Add'.

		CIPANTS			Send	l participants
L BELLUCCI, Monica Ministry I TALY Public authonity, COUNTRY Image: Country   L SPIELBERG, Steven MOF I TALY Public authonity, COUNTRY Image: Country   ADD PARTICIPANT Image: Country Country represented) Image: Country represented)   I from the last 5 meetings Image: Country represented) Image: Country represented)   Country Image: Country Image: Country represented) Image: Country represented) Image: Country represented)   Country Image: Country Image: Country represented) Image: Country represented) Image: Country represented)   Country Image: Country Image: Country represented) Image: Country represented) Image: Country represented)   International organisation Image: Country Image: Country represented) Image: Country represented) Image: Country represented)   International organisation Image: Country Image: Country represented Image: Country represe		articipants and send it to the orga	niser. If no participants will attend the meeting y	ou must also notify the (	organiser by se	nding an
L SPIELBERG, Steven     MOF     I TRLY Public authonity, COUNTRY     Image: Country       ADD PARTICIPANT <ul> <li>as a new participant of this member</li> </ul> <ul> <li>Atom</li> </ul> Representation level 0 <ul> <li>Country 0</li> <li>Italy</li> </ul> <ul> <li>Italy</li> </ul> Other public body 0 <ul> <li>EU body 0</li> <li>International organisation 0</li> </ul> <ul> <li>International organisation 0</li> </ul> Public administration name 0 <ul> <li>International organisation 0</li> </ul> First name              Last name             Ellen <ul> <li>Smith</li> <li>Binsth agora@gmail.com</li> </ul>	PARTICIPANT A	ORGANISATION	REPRESENTATION	EXPENSES CLAIM	COMING?	
ADD PARTICIPANT   from the last 5 meetings  e as a new participant of this member  Representation level 0  Country 0  Country Country represented 0  Country Country represented 0  Country 0  Italy  Country country represented 0  Italy  Country 0  Italy  It	BELLUCCI, Monica	NEW Ministry	🔲 ITALY Public authority, COUNTRY	•	0	Actions -
from the last 5 meetings         e as a new participant of this member   Representation level         Country         Country Country represented)         Italy         Country Country represented         Italy         Country Country represented         Italy         Italy         Country Country represented         Italy         Country Country represented         Italy         Country Country represented         Italy         Country Country represented         Italy         Ita	SPIELBERG, Steven	NEW MOF	ITALY Public authority, COUNTRY	×	-	Actions -
from the last 5 meetings     @ from the last 5 meetings     @ as a new participant of this member     Representation level ①   @ country ①   ① Other public body ①   ① Other public body ①   ① EU Body ②   □ International organisation ①     Public body ①   ② Entitled to claim expenses		_				
Representation level ①     Country (country represented) ①       © Country ①     Italy       © Other public body ①     Italy       © Other public body ①     Italy       © BU Body ①     Italy       International organisation ①     Italy       Public administration name ①     Italy       Ministry of Finance     Lost name       Ellen     Smith       Email     ellen.smith.agora@gmail.com	ADD PARTICIPANT					
Country O     Italy     Italy     Other public body O     EV Body O     International organisation O  Public administration name O  Public administration name O  First name Ellen Ellen Ellen Email ellen.smith.agora@gmail.com	from the last 5 meetings	<ul> <li>as a new particip</li> </ul>	pant of this member			
Other public body ①       EU Body ①       International organisation ①       Public administration name ①       Ministry of Finance       Ellen       Ellen       enail       ellen.smith.agora@gmail.com	Representation level O		Country (country represen	nted) 0		
EU Body C International organisation C Public administration name C Ministry of Finance First name Ellen Ellen Email ellen.smith.agora@gmail.com	Country 0		Italy			
International organisation ● Public administration name ● Ministry of Finance First name Ellen Ellen Email ellen.smith.agora@gmail.com	🔿 Other public body 🖸					
Public administration name  Pu	🕞 EU Body 🟮					
Ministry of Finance First name Ellen Ellen Email ellen.smith.agora@gmail.com	<ul> <li>International organisatio</li> </ul>	n <b>O</b>				
First name Last name Ellen Smith Email ellen.smith.agora@gmail.com						
Ellen Smith Email ellen.smith.agora@gmail.com	Public administration nar	ne O				
ellen.smith.agora@gmail.com		ne O				
ellen.smith.agora@gmail.com	Ministry of Finance	ne 9	Last name			
ellen.smith.agora@gmail.com	Ministry of Finance	ne 🛛				
	Ministry of Finance First name Ellen	ne <b>O</b>	Smith	85		
	Ministry of Finance First name Ellen Email		Smith	es		

The participant will appear in the section '**Delegation Participants**'. You can now add another participant if you want.

After adding a participant, you'll see the label '**New**' next to the participant's name, meaning that this participant is new to the list.

In the column '*Attendance*' you see a question mark ('?') (The correspondent adding himself can already confirm the attendance). Although you may know this information as a correspondent, the participant will confirm it in AGM.

To **edit** a participant's details or **remove** them from the list, click the '*Action*' button next to the participant.

INVITATION PARTICIPANTS	TIMELINE				
DELEGATION ASSIGNMEN	NTS				
SPIELBERG, Steven CORRESPO	NDENT				
DELEGATION PARTICIPA	NTS			Send	l participants
A Please fill in the list of particip. empty list.	ants and send it to the organ	iser. If no participants will attend the meeting yo	u must also notify the o	irganiser by se	nding an
PARTICIPANT A	ORGANISATION	REPRESENTATION	EXPENSES CLAIM	COMING?	
L BELLUCCI, Monica	Ministry	ITALY Public authority, COUNTRY	×	0	Actions 🗸
SMITH, Ellen	Ministry of Finance	ITALY Public authority, COUNTRY	×	Θ	Actions 🗸
SPIELBERG, Steven	MOF	■ ITALY Public authority, COUNTRY		•	Actions 🗸
ADD PARTICIPANT	🔵 as a new participa	ant of this member			

When your list of participants is ready, click the 'Send Participants' button to send the list to the meeting organiser.

The following message appears – click 'Accept' to send the list.

SEND LIST OF PARTICIPANTS TO THE MEETING ASSISTANTS
The list of participants from this delegations is ready to be sent to the meeting organiser for validation.
Accept Cancel

After you send the list, you cannot edit it in this screen anymore.

You will receive a **confirmation message** telling you the participants list has been sent to the meeting organiser. The same message appears in the <u>notification</u> menu in AGM.

At the same time, every participant on your list will receive an email telling them their name has been put forward to participate in a meeting.



#### 2.1.3. Edit the list of participants

The list of participants has been sent to the meeting organiser for validation.

You must now wait for news from the meeting organiser.

The meeting organiser may decide to **validate the list** without any remarks, or can ask you to **make changes**. Either way, you'll receive an email and a separate notification in AGM.

If the meeting organiser asks you to edit the list of participants, you'll receive this email:

Please modify the list of participar	nts representing Germany - EPSCO meeting in Brussels starting on 10/03/2017 Intex x	0.5
AGM notification <automated-notifications@r aan mij ∵</automated-notifications@r 	omail.ec.europa.eu>	2 mrt. 📩 📥
	Advanced Gateway to your Meetings	
	Dear Patrick JANSEN,	
	The meeting organiser has asked you to modify the list of participants for the EPSCO meeting in Brussels starting on 10/03/2017. The meeting organiser has asked you to modify the list because:	
	Please add an extra participants to the list.	
	Please modify the list and send it to the organiser for revalidation.	
	This is an automated email, so please do not reply. AGM	
	Log in to AGM to see all your notifications.	

To edit the list of participants, go to AGM and open the meeting.

Open the 'Participants' menu, this screen will now appear in editable mode.

Choose the participant you want to remove and click on the 'Actions' button next to the participant.

		•		_				
NVITATION PAR	TICIPANTS	MESSAGES TIME	LINE					
CORRESPONDE	NTS							
💄 SMITH, John								
				_			_	_
DELEGATION PA	ARTICIPAN	ITS					Send pa	articipants
PARTICIPANT A		ORGANISATION	COUNTRY		REIMBURSEMENT	ATTENDANCE		
Hill, Loreen	SAVED	Green Planet	🎟 United Kingdor	n	×	0		Actions $\bullet$
Mayer, Helmut	SAVED	Green Planet	🖩 United Kingdor	n	×	0		Actions $\bullet$
Smith, Ellen	SAVED	Green Planet	🎟 United Kingdor	n	×	0	Edit	Actions 👻
							Remove	
ADD PARTICIE	PANT							
$^{\odot}$ from the last 5 me								
as a new participa	nt of this me	mber						
First name				Last na	ame			
Email				Organi	sation			
Country				🗏 Req	uest for reimbursement			
Select country			•					
Represented country								
							Cancel	Add
HISTORY OF PA	RTICIPAN	T LISTS					Show p	articipants
							Short p	
28/04/2015	PARTICIPAN	ITS SENT by 👤 SMITH, John						

Select '*Remove*' to remove the participant from the list.

CORRESPONDEN	ITS					
👤 SMITH, John						
DELEGATION PA	DTICIDANT	c				
	RIGIFANT	5				Send participants
	KIICIPANT	ORGANISATION	COUNTRY	REIMBURSEMENT	ATTENDANCE	Send participants
PARTICIPANT 🔺	SAVED		COUNTRY	REIMBURSEMENT	ATTENDANCE 2	
PARTICIPANT A Hill, Loreen Mayer, Helmut		ORGANISATION Green Planet				Actions -

If you spot that the details of a participant are incorrect, you can edit them by clicking on the '**Actions'** button next to the participant's name. Then select '**Edit**'.

Edit participant		×
Representation level 0	Country (country represented) 0	
Country 3	Italy	•
Other public body 3		
💿 EU Body 🟮		
International organisation <b>O</b>		
Public administration name 🟮		
Ministry of Finance		
First name	Last name	
Ellen	Smith	
Email		
ellen.smith.agora@gmail.com		
Entitled to claim expenses 🗹	Coming? Yes No	
	⊘ Update	incel

Click on '*Update'* to save the changes.

When you've made all the required changes, send the list of participants to the meeting organiser for validation.

You will receive another **confirmation message** by email and a separate notification in AGM telling you the list has been sent to the meeting assistant for validation.

At the same time, the **removed participant will receive an email** stating that he has been removed from the list.

#### 2.2. Participant

A participant is an **expert who attends a meeting**. A participant can be *part of a delegation* (usually nominated by a correspondent) or *attend on individual basis* (directly invited by the organiser).

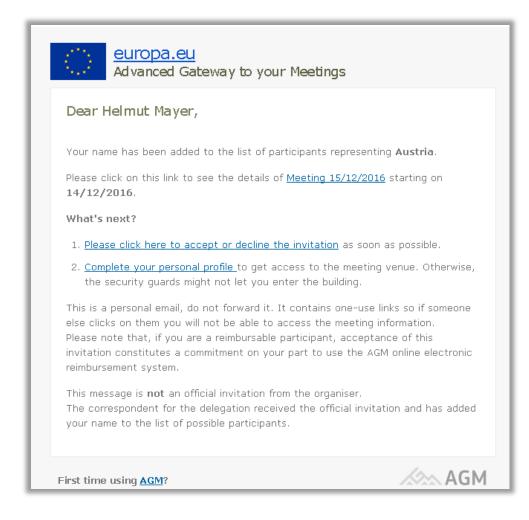
The participant will receive an email suggesting they attend a meeting, with a link to AGM.

As a participant, you can access the invitation in AGM and check other information about the meeting.

First, you receive an email suggesting you participate in a meeting.

This email includes a link to **activate your user profile** for that meeting.

Use the link in this email to accept or decline the invitation, and submit your personal details to obtain an e-pass access to enter the building.



#### 2.2.1. Log in as a participant

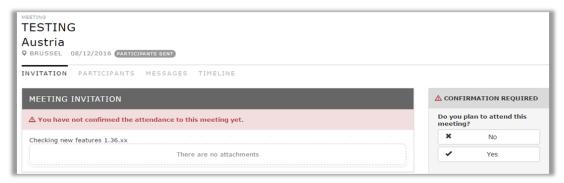
Click on the link with the meeting invitation name and log in using your ECAS account. The first time you open a meeting, you'll need to link the meeting to your user profile. You'll have to do this **once** <u>for each meeting</u> group.

USER PROF	ILE ACTIVATION	
You have clicked	on a one-use link sent to the email:	
• Helmut MA	/ER < <b>Helmut.Mayer3020@gmail.com</b> >	
	e my profile" to access the meeting information. if you are not 'Helmut MAYER'.	
Once activated,	the link of the email cannot be used anymore.	
I agree to that	t my personal data will be used according to these	rules.
	Activate my profile Cancel	

Click on 'Activate my profile', then the meeting invitation appears.

Here you can read the invitation, view any attachments and confirm your attendance.

Under the meeting invitation title you'll see the message 'You have not confirmed the attendance to this meeting yet.'



Here you need to click on yes to confirm the attendance and if it is a multiple day meeting by default all the days are selected. You can deselect the number of days you will not attend the meeting. If all days are deselected, the attendance changes to no.

TEST MEETING FRONT OFFICE MANUAL AGENCY FOR THE MANAGEMENT OF OPERATIONAL COOPERATION BORDERS OF THE MEMBER STATES OF THE EUROPEAN UNION*FR 9 BRUSSEL 12/05/2017 (3 DAYS) (PARTICIPANTS GENT INVITATION PARTICIPANTS TIMELINE	
MEETING INVITATION	YOUR REPLY
✓ Invitation accepted You have accepted the invitation to this meeting.	Will you come to this meeting?
	× No
There are no attachments	Ves Please click on the meeting day(s) to mark in green the days you plan to come (1st, 2nd, etc.) and gray those you will not come. 1 2 3

Click the dropdown menu in your profile name to enter your personal details.

	💄 e. SMITH (ellen-sr	nith-agora) 👻
Complete your personal data under your profile details to get access to the meeting ven ot let you enter the building	ue. Otherwise the secu	Profile details Notifications
	/ O-L	.og out

HOME / PROFILE DETA	us		ellen S	MITH (ellen-smith-agora)+
PROFILE DETA				
MEETINGS NOTIFICA	TIONS PROFILE DETAILS			
ECAS INFORMATION	١			
Name	SMITH, ellen			Change
ECAS login	ellen-smith-agora			
Email address	ellen.smith.agora@gmail.com			Change
Password	******			Change password
Unit				
PROFILE DETAILS				
Gender	Female Male			
Date of birth	Select date of birth			
Nationality	Select country			
				_
				Cancel Save
IDENTITY DOCUME	NTS			
⊕Add new document				
ТҮРЕ	NUMBER	EXPIRY DATE	COUNTRY OF ISSUE	
	No id	lentity documents have been	added yet	
<u>(</u>				······································

On this page you'll find information about your EU login. If necessary, you can change these details by clicking the 'Change' button next to each heading.

You need to enter your profile details and identity documents. The meeting organizers need this information to prepare and request your e-pass access to the meeting venue. Once this information is entered, it will be valid and will be stored on your profile. This means that you only need to enter it once and update it only if necessary.

Complete the 'Profile details' section and click on 'Save'.

PROFILE DETAILS		
Gender	Female Male	
Date of birth	20/06/1975	
Nationality	United Kingdom X v	

Complete the 'Identity documents' section:

Click on 'Add new document' to enter the details of your identity document:

⊕Add new document					
ТҮРЕ	NUMBER	EXPIRY DATE	C	OUNTRY OF ISSUE	
Select a document type	•		iii s	Select country	▼
Select a document type					Calicer
Identity card					
Passport number					
Driving license					

Select the type of document; enter the number, expiry date and the country of issue. Then click 'Update' to save this information.

Please remember to update this section when your current document expires. In every meeting invitation you will be asked to enter your profile details. They remain valid in AGM once you have entered them, but we recommend you check that the information you entered is still valid.

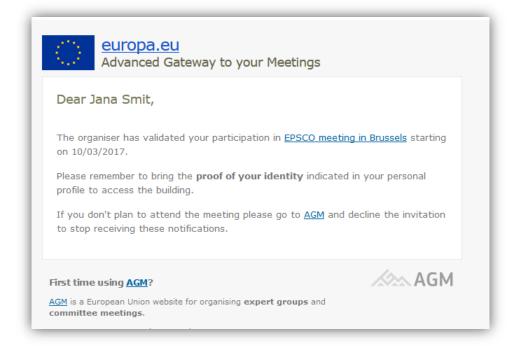
IDENTITY DOCUM	IENTS			
⊕ Add new document				
ТҮРЕ	NUMBER	EXPIRY DATE	COUNTRY OF ISSUE	
Identity card	Z123478	20/08/2020	🔠 United Kingdom	Edit 👻

Via the edit button next to the document details, you can update or remove the current document. This page can also be accessed via the link in the invitation.

#### 2.2.2. Enter payment details

When the participants list is validated by the meeting organiser (direct invited delegations are validated as soon the meeting invitation was sent), all participants, including the correspondent, will receive an email and a separate notification in AGM.

If you are **not entitled** to claim expenses, *you do not need to do anything* – the email you receive will not mention this procedure.



If you are entitled to have your travel expenses reimbursed, you'll receive the same notification with a message telling you to *enter your bank account details in AGM*.

0	europa.eu A Gateway to EU Meetings
Dear	Steven Spielberg,
You are on 08/1	allowed to claim for expenses associated to the meeting " <u>Testing</u> " starting 2/2016.
Please g	enter your bank details as soon as possible to speed up the expenses claim .
	bmitting your bank account details, you can start introducing your as but you will be able to submit your claim only once the organiser:
	dates that you bank details comply with the rules on the reimbursement of enses. You will be notified otherwise.
2. Con	firms your attendance to the meeting.
You will	receive a notification once your attendance is confirmed.
	on't plan to attend the meeting please go to <u>AGM</u> and decline the invitation receiving these notifications.

Log in to AGM using your EU login account to view the meetings list:

HOME / MEETINGS LIST		•			
MEETINGS LIST					
MEETINGS NOTIFICATIONS					
MEETINGS					
Clear filter Clear sort					
DATE • ③ MEETING GROUP	MEETING	REIMBURSEMENT			
27/04/2015 Connections	United for the future of our planet Green planet Governmental PARTICIPANTS LIST VALIDATED	DRAFT Please enter bank account details Go to reimbursement			
		1 - 1 of 1 items 🕻			

The 'Meetings' list shows all upcoming or previous meetings to which the participant has been invited.

For meetings where you are entitled to have your expenses reimbursed, the information will appear in the 'Expenses Claim' column.

In the example above, the claim is in 'Draft' status and the bank account details have not been entered.

Click on the link 'Go to expenses claim' to access the claim form.

(For more info about the expenses claim form, see <u>*Complete and submit expenses claim*</u>. This section only explains how to **enter your bank details**.)

MEETINGS LIST /	REIMBURSEMENT							
CONNECTIONS								
UNITED FO	R THE FUTU	RE OF OUF	R PLANET					
Green plan								
• CHARLEMAGNE-	BRUSSEL 27/04/201	5 CEST (2 DAYS)						
DETAILS BANK	ACCOUNT							
MEETING DET	AILS	15.05.00	<b>UPLANET</b>					
Delegation Green planet Go Expert HILL, loreen Organisation Green Planet III	overnmental United Kingdom			Attended sess X Reimburseme DRAFT				
TRAVEL DETA	ILS			Country				
Place of work				Country				
								Ŧ
OUTWARD	EPARTURE		→ →		ARR	VAL	<b>III</b> (-)	
RETURN			+					
							Cancel	Save
EXPENSES								
(			No expenses have	been added yet				
Select expense ty	ре					<b>_</b>	🕂 Add expense	
STATUS								DRAFT
X Your bank ac	count for this reimburse	ment is not yet comp	leted Enter bank acc	ount		1		
× Your travel d	etails are not yet comp	leted						
X You have not	provided any expenses	for this reimbursem	nent					
X You have not	provided at least one s	upporting document	for the expenses					
X Your attendar	nce to the meeting has	not yet been confirm	ned, therefore you c	annot send your	reimbursem	ient request yet	:	
Status of the reim	bursement request. Ple	ase verify that all pro	e-conditions are ok	in order to be al	ble to submi	t your reimburs	ement request.	

Your bank account details are stored in the second tab of the form. Click on the tab 'Bank account' or click on the button 'Enter bank account' in the Status section.

The 'Bank Account' screen appears.

MEETINGS LIST / REIMBURSEMENT	
CONNECTIONS	
MEETING UNITED FOR THE FUTURE OF OUR PLANET	
Green planet • charlemagne-brussel 27/04/2015 (2 Days) (participants list validated)	
DETAILS BANK ACCOUNT	
AVAILABLE BANK ACCOUNTS	
<ul> <li>Please select or create a new bank account for this reimbursement and submit it for validation</li> </ul>	
No bank accounts found	
Add new bank account	
Su	bmit bank account

This screen shows the bank accounts you've used for different expenses claims.

In the example above, there are no previous bank accounts as this is the first meeting that this participant is attending.

#### 2.2.2.1. Add new BA for Governmental Experts

Click on 'Add new bank account' to start entering the bank account details:

ETAILS BANK DETAILS				
ADD NEW BANK ACCOUNT				
Before we reimburse you, we need to check your bank detaare already registered with us.	ails are valid. P	ease enter the basic inforn	nation requested below to s	ee if your bank details
ACCOUNT DETAILS		LEGAL ENTITY		
Country 3		Organisation 🟮		
Belgium	•	KONINKRIJK BELGIE*RO	YAUME DE BELGIQ UE KONI	GREICH BELGIEN KINGD
IBAN 3      Account number		Address		Postal code
		-		
Name of account holder <b>1</b>		City	Country	
		-	Belgium	
		VAT number		
		A The predefined lega been loaded. This info therefore it cannot be	al entity details for this gove rmation is linked to your re modified.	ernmental expert have presented country,
Cancel Verify				

The legal entity is loaded from ABAC automatically; this info is related to the country of provenance of the governmental delegation (in this case the delegation was coming from UK).

Select the country under the account details, this option is available because the account can be located in another country as the delegation country. After selecting the country, the IBAN/Account number and Account holder name fields will be available and needs to be filled as mandatory information's.

There are three exceptions related to:

- The Irish Treasury account
- The French Ministries (accounts held at service de contrôle Budgétaire et Comtable Ministériel – MINEFI)
- Italian accounts held at Tesoreria Centrale Dello Stato

The expert representing a Member State can use those accounts (if the IBAN and the account number is not available and they only have the treasury account reference number) by selecting the link "Treasury account" and then entering as account number a specific code that is provided by the European Commission. To receive the specific code contact <u>ec-agm-support@ec.europa.eu</u> indicating your email, your ministry and country and the account you'd like to use (if you have a previous expert reimbursement sheet please attach it).

The **IBAN** field let enter only the *correct number of letters and numbers* for each country.

Click on the 'verify' button after filling in all the required fields under the account details.

If the Bank account exists in ABAC, (after selecting confirm on the warning message if you want to use this new added account) the bank account can be submitted:

SELECTING BANK ACCOUNT		
ACCOUNT DETAILS Bank country Belgium IBAN BE13360107673339 Name of account holder UNIVERSITY OF BRUSSEL	LEGAL ENTITY DETAILS Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM Address - Postal code	COMPLIANCE Bank account details not yet used
	- City - Country - Belgium VAT number - Organisation KONINKRIK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM	
BANK ACCOUNT DEROGATION®		
IS THE SELECTED BANK ACCOUNT IN BODY?	THE NAME OF THE MEMBER STATE, ONE O	F ITS MINISTRIES OR A PUBLIC
Yes (You can submit your the bank details     No (You need to provide evidence that you     account)	for validation <b>)</b> I have permission from your member state, one of its	ministries or a public body to use this bank
Cancel Submit bank details		

If the Bank Account is new in ABAC, a new window will open where the expert needs to fill, as mandatory information's, the Account Holder and Bank Branch sections. If you selected the option to certify that you are the account holder, it is mandatory to add a recent bank statement:

ACCOUNT			LEGAL ENTITY		
Account name 0			Organisation 🟮		
PRIMARY			KONINKRIJK BELGIE*ROYAUM	IE DE BELGIQ UE KONIGR	EICH BELGIEN KING
IBAN	BIC / Swift Code	e <b>()</b>	Address		Postal code
GB29NWBK60161331926819	9		-		
Currency 🖲			City	Country	
EUR - EURO		•	-	Belgium	
				n is linked to your represe	nted country,
Name of account holder <b>9</b> PROD UK			BANK BRANCH BANK BRANCH BANK BRANCH Bank name BARKLEYS BANK Address T STREET		nted country,
ACCOUNT HOLDER Name of account holder () PROD UK Address () STREET PO box number ()	Postal code <b>8</b>		therefore it cannot be modifi BANK BRANCH Bank name BARKLEYS BANK Address 0		
Name of account holder () PROD UK Address () STREET	Postal code 🕄		therefore it cannot be modifi BANK BRANCH Bank name BARKLEYS BANK Address <b>O</b> STREET	ed.	
Name of account holder () PROD UK Address () STREET PO box number () 1			therefore it cannot be modifi BANK BRANCH Bank name BARKLEYS BANK Address © STREET PO box number ©	Postal code (	
Name of account holder () PROD UK Address () STREET PO box number ()	1000		therefore it cannot be modifi BANK BRANCH Bank name BARKLEYS BANK Address <b>0</b> STREET PO box number <b>0</b> 1	Postal code (	0

If you select the option that you are not the account holder, after saving the information's and confirming the Bank Account Creation, you need to print the financial identification form, asking the account holder to sign it and upload the scanned version. The recent bank statement is not mandatory in this case, but if it is missing the financial identification form needs to be stamped and signed as well from the Banks representative:

ACCOUNT DETAILS	LEGAL ENTITY DETAILS	VALIDATION STEPS
Bank country E United Kingdom IBAN GB29NVBK60161331926819 Account name	Organisation KONINKRIJK BELGIE <sup>®</sup> ROVAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BELGIUM Address	As you are not the account holder please print out this form, ask the account holder to sign it, and upload a scanned version Download form for signature
PRIMARY Name of account holder	Postal code -	
PROD UK	City	
Bank name BARKLEYS BANK	- Country Belgium VAT number	
	<b>Organisation</b> KONINKRIJK BELGIE <sup>®</sup> ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM	
Select this bank details		O Upload signed form

Upload the signed form and save it, after confirming the update, the signed form will be available in account details and you can select the BA and submit it for validation:

SELECTING BANK ACCOUNT		
ACCOUNT DETAILS Bank country III United Kingdom IBAN GB29NWBK60161331926819 Account name PRIMARY Name of account holder PROD UK Bank name BARKLEYS BANK Signed form BAR-IDENTIFICATION.pdf (22.0 KB)	LEGAL ENTITY DETAILS Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM Address - Postal code - City - Cuntry Belgium VAT number - Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM	
BODY?      • Yes (You can submit your the bank d	T IN THE NAME OF THE MEMBER STATE, ONE etails for validation <b>)</b> at you have permission from your member state, one o	
Cancel Submit bank details		

After the Bank Account was submitted for validation, the expert will be informed by email if a correction of the bank account details or another bank account is required:

European Commission A Gateway to EU Meetings
Dear Steven SPIELBERG,
You need to correct the bank account details for the expenses claims listed below because:
New BA identification document requested
Expense claims:
Meeting 2 starting on 07/07/2016, link to the <u>expenses claim here</u>
Please correct and resubmit your bank account details for validation using the links above. Please note only expenses claims listed above are affected. For any other expenses claim you have made, no further action is required.
This is an automated email, so please do not reply.
Click here for more help on using AGM.
Log in to AGM to see all your notifications.



### 2.2.2.2. Add new BA for Private Experts

Click on 'Add new bank account' to start entering your bank account details:

ase enter the basic information r	equested below to see if	your bank details are
LEGAL ENTITY		
Organisation		
Irish national teachers org	anitation	
Address		Postal code
Parnell street		1
City	Country	
Dublin	Ireland	
VAT number		
	LEGAL ENTITY Organisation ① Irish national teachers org Address Parnell street City Dublin	Organisation ① Irish national teachers organitation Address Parnell street City Dublin Ireland

The **IBAN** field let you enter only the *correct number of letters and numbers* for each country.

If you enter an incorrect IBAN or account number, the financial department of the European Commission will tell you after verification.

All the fields are mandatory except the 'VAT number'.

Click on the *Verify* button after filling in all the required fields.

In the next screen, you'll be asked if you want to use this bank account for your expenses claim:

CONFIRM BANK DETAILS CREAT	ION
ACCOUNT DETAILS	LEGAL ENTITY DETAILS
Bank country I Ireland	Organisation Irish national teachers organitation
IBAN IE35AIBK93105539523030	Address Parnell street
Name of account holder IRISH NATIONAL TEACHERS ORGANITATION NO 1 ACCOUNT	Postal code 1 City
	Dublin Country III Ireland
	VAT number
Are you sure you want to add this bank account t be linked to your expenses claim after you select	to your list of bank accounts? This bank account will it and will be sent to us for validation
Canc	el Ok

Click on 'Ok', and on the next screen confirm the use of this bank account for this expense claim:

CONFIRM BANK DETAILS CREAT	1011
ACCOUNT DETAILS	LEGAL ENTITY DETAILS
Bank country Ireland	Organisation Irish national teachers organitation
IBAN IE35AIBK93105539523030	Address Parnell street
Name of account holder IRISH NATIONAL TEACHERS ORGANITATION	Postal code 1
NO 1 ACCOUNT	<b>City</b> Dublin
	Country III Ireland
	VAT number
Are you sure you want to add this bank account be linked to your expenses claim after you select	to your list of bank accounts? This bank account wil it and will be sent to us for validation
	it and will be sent to us for validation

2.2.3. Modifying bank account details

During the bank account validation process, the financial department may ask you to *modify your* bank account details or enter a new bank account.

In this case, you'll receive an email and a notification in AGM.

In the example below, the financial department is asking the participant to update the account holder name from personal name to company.

<u>Here</u> you can see that the expert accidentally entered her *own name* instead of the *company name* when entering her bank account details.

A Gateway to EU Meetings
Dear Monica BELLUCCI,
You need to correct the bank account details because:
Please update the bank account holder name
Use the links below to correct and resubmit the bank account for each of the expenses claims corresponding to the meetings:
United for the future of our planet starting on 09/01/2017, link to the <u>expenses</u> <u>claim here</u>
Please note only expenses claims listed above are affected. For any other expenses claim you have made, no further action is required.
This is an automated email, so please do not reply.
<u>Click here for more help on using AGM</u> . <u>Log in to AGM</u> to see all your notifications.

Click on the link in the email to log in to AGM using your ECAS account details. This will take you to the **bank account** details screen.

Bank country	Organisation Irish national teachers organitation	Bank account details not yet used	
IBAN IE35AIBK93105539523030	Address Parnell street		
Name of account holder IRISH NATIONAL TEACHERS ORGANITATION NO 1 ACCOUNT	Postal code 1		
	City Dublin		
	Country		
	VAT number -		
Select this bank details			📝 Ed

Click the '*Edit*' icon and the following screen appears:

EDIT BANK ACCOUNT			
Before we reimburse you, we need to check your bank details are valid. Plea already registered with us.	se enter the basic information r	equested below to see if y	our bank details are
ACCOUNT DETAILS	LEGAL ENTITY		
Country 🕄	Organisation ()		
Ireland 🔹	Irish national teachers organitation		
IBAN      C Account number	Address		Postal code
IE35AIBK93105539523030	Parnell street		1
Name of account holder 🕄	City	Country	
IRISH NATIONAL TEACHERS ORGANITATION NO 1 ACCOUNT	Dublin	Ireland	•
	VAT number		

The screen is displayed in editable mode. Any data you entered previously is still there. Just make the necessary changes and click '**Verify**'.

# 2.2.4. Link a bank account

A bank account that has been validated and used for a meeting belonging to one meeting group can be used for reimbursement for another meeting in the same group, without being validated again. But if you want to use this bank account for a *meeting that belongs to another meeting group*, you need to link it to the new meeting group.

In the example above the participant has to submit his bank account details to have expenses reimbursed for the meeting '*Notification*' that belongs to meeting group '*New wave*'.

Under 'Available bank accounts' you can see the bank account used in the meeting group 'BUDG – AGM Acceptance'. Click on select this bank account and on the following screen click on 'Submit bank details' to link the account to the new meeting group:

SELECTING BANK ACCOUNT			
ACCOUNT DETAILS Bank country Germany DE31512500000001019244 Account holder KLINIKEN DES HOCHTAUNUSKREISESGMBH	LEGAL ENTITY DETAILS  Organisation BUNDESREPUBLIX DEUTSCHLAND "REPUBLIQUE FEDERALE D ALLEMAGNE FEDERAL REPUBLIC OF GERMANY  Postal code - City - County County Commany VAT number  Organisation BUNDESREPUBLIX DEUTSCHLAND "REPUBLIQUE FEDERALE D ALLEMAGNE FEDERAL REPUBLIC OF GERMANY	COMPLIANCE Used in meeting groups • BUDG -AGMACCEPTANCE	
BANK ACCOUNT DEROGATION IS THE SELECTED BANK ACCOUNT IN THE NAME OF THE MEMBER STATE, ONE OF ITS MINISTRIES OR A PUBLIC BODY? Pres (You can submit your the bank details for validation) No (You need to provide evidence that you have permission from your member state, one of its ministries or a public body to use this bank account)			
Cancel Submit bank details			

#### 2.2.5. Complete and submit expenses claim

If you are entitled to claim expenses, you can only submit your claim *after the meeting has been held* and the **meeting organiser** has *confirmed your attendance*.

You will receive an **email** and a **notification** telling you that the meeting organiser has confirmed your attendance.

A Gateway to EU Meetings	
Dear Woody ALLEN, The organiser has confirmed your attendance at New Features starting on 24/11/2016. Please <u>complete and submit your expenses claim</u> as soon as possible. You must do this within the next 30 days. After this deadline, the meeting organiser will not reimburse your travel expenses or pay any allowances.	
This is an automated email, so please do not reply.	AGM

Click on the link in the email to access AGM and log in using your ECAS account.

Go to the meeting list and click 'Go to expenses claim'. This will be in '*Draft*' status next to the meeting for which your attendance has been confirmed.

If you don't start the reimbursement process after this email, you will receive a reminder 10 and 20 days after the meeting assistant closes the meeting. Remember, the submission deadline of the expense claim is 30 days, after reaching the 30 days the claim will be considered as foregone (You

have foregone the expense claim or the claim submission deadline has been reached) and cannot be submitted anymore.

If you haven't yet entered your bank account details, you'll see the message '*please enter bank account details*' next to the expenses claim. You can see <u>how to edit your bank account details</u> here.

The expenses claim form has 3 main sections:

Travel details

Expenses

<u>Status</u>

In the top right-hand corner, the **attended sessions** appear, as confirmed by the meeting organiser.

MEETINGS LIST	/ REIMBURSEMENT						
CONNECTION	s						
UNITED F	OR THE FUT	JRE OF OUR PLAN	IET				
Green pla	anet E-BRUSSEL 27/04/20	15 CEST (2 DAYS)					
DETAILS BAI	NK ACCOUNT						
MEETING D	ETAILS						
Delegation	Governmental		Atten	ded sessions	La lerr bear pours corrès : d'alla des		
Expert			Reim	oursement			
Organisation Green Planet	n 📰 United Kingdom						
TRAVEL DE	TAILS						
Place of work			Count	ry			
							•
OUTWARD	DEPARTURE	<b>m</b> 0	→ →	A	RRIVAL		
RETURN			→				
Expert's com	nents						
						_	
						Cancel	Save
EXPENSES							
			es have been a				
Select expense	e type				•	🕂 Add expense	
STATUS							DRAFT)
	_	_	_	_	_		
Your bank	account was successfully	y validated					
X Your trave	el details are not yet com	pleted					
🗙 You have	not provided any expense	es for this reimbursement					
🗙 You have	not provided at least one	supporting document for the exp	enses				
✓ Your atter	ndance to the meeting has	been confirmed					
Status of the re	eimbursement request. Pl	ease verify that all pre-conditions	are ok in orde	er to be able to sub	omit your reimburseme	ent request.	

On the bottom of the expense claim you have an option "x I will not claim expenses":

STATUS	(DRAFT)
X Your bank details are awaiting for validation	
$\checkmark$ Your attendance at the meeting has been confirmed by the meeting organiser	
I will not claim expenses	

By using this option you can indicate that you don't want to claim the expense, preventing any notification still related to this expense claim. You will be prompted to enter a justification message about the reason you don't want to be reimbursed and the expense claim status will change in "Foregone":

voure about to execute the actio might not be undone.	n "WON'T CLAIM" for the following expenses claim. This action
Delegation Germany Private	Attended sessions
Expert L DICAPRIO, leo	Expenses claim
Organisation Canon	
Representation GERMANY Private authority,	Organisation
	e not going to claim the expenses (already received from anothe
Expenses will be reimbursed b	y another organitation
·	
	e with the process please click on button "Ok".

Under '**Travel Details**' click on edit (on the bottom of the section) to enter the details of your journey by completing the following fields:

Place of work

Country

Departure details

Arrival Details

Expert's comments (here you can add comments to explain any issues).

Select country		
The place of departure differs from the place of work and/or the place specified in the invitation letter $m 0$		
DEPARTURE → ARRIVAL		
OUTWARD	•	
RETURN		
xpert's comments		

Click 'Save' to save the information.

Under 'Expenses', you can add expense types by clicking on the dropdown menu 'Select expense type'. Then click 'Add expense'.

XPENSES				
	No expens	ses have been added yet		
Accommodation			T	+ Add expense
Select expense type				
Accommodation				DRAF
Daily allowance				
Airplane				
Train				
Private car				
Other transport				

The expense types may vary from the list above, depending on the rules of your meeting group.

Now add the different expense types.

**Accommodation expense**: Enter the number of nights. Upload supporting documents such as the hotel bill (only non-editable attachments are allowed: PDF, JPG, PNG, TIF, TIFF, BMP and GIF and you should provide <u>at least one</u> supporting document for each expenses claim).

Accommodation expense	×
Number of nights	
<ul> <li>If you have to spend one or more nights at the place where meetings are imcompatible with the times of flights or trains accommodation allowance. This allowance shall be 100 € per exceed the number of meeting days + 1.</li> <li>An additional accommodation allowance and/or daily allowar the stay would enable you to obtain a reduction in the cost of these allowances.</li> </ul>	;, you shall also be entitled to an r night. The number of nights may not nce may, exceptionally, be paid if prolonging
Select files	
Only PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF files are accepted	
	OUpdate Cancel

After adding your accommodation expense type, it will appear in the List of Expenses

**Daily allowance expense**: Enter the number of nights and upload your supporting documents. Click on '**Update**' to save.

aily allowance expense ×
Number of days 2
<ul> <li>The daily allowance is a flat rate. It covers all meals and local transport (bus, tram, metro, taxi, parking, motorway tolls, etc.), as well as travel and accident insurance. It amounts to 92 € per day of meeting.</li> <li>If the distance between the place of departure cited in the invitation (be it your private or professional address) is 100 km or less from the place where the meeting is held, the daily allowance shall be reduced by 50%. You shall then only receive 46 € per day of meeting.</li> </ul>
Supporting documents
Select files
Done 📀
tickets.pdf (79.8 kB) ×
Only PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF files are accepted
⊘ Update S Cancel

*Airplane expense*: Enter the **price** paid and select the **currency**. If you bought a *business class ticket*, you should upload supporting documents to show why. Upload your supporting documents and click '**Update**' to save.

irplane expense	>			
Price paid	350.00			
Currency	EUR - Euro Member Countrie: 🔻			
Business class ticket	Should you tick this checkbox you will have to attach a supporting document from the travel agency justifying there was no place available in economy class			
Supporting documents				
Select files				
Done 🕢				
tickets.pdf (79.8 kB) ×				
Only PDF, JPG, JPEG, PNG, TIF, TIFF, B	MP and GIF files are accepted			

Expenses list:

All the expense types you've entered will appear here.

There is an '*Edit'* button next to each expense type if you need to make changes.

There is a separate column for each expense type.

Any comments entered by the meeting organiser during the validation process will appear in the'RequestforModifications'column.

TYPE	DETAILS	SUPPORTING DOCUMENTS	REQUEST FOR MODIFICATION	
ACCOMMODATION	Duration         2 nights           (flat rate)         × 100.00 €/night           Total         200.00 €	tickets.pdf (79.8 kB)		Edit
DAILY ALLOWANCE	Duration 2 days (flat rate) × 92.00 €/day Total 184.00 €	tickets.pdf (79.8 kB)		Edit
AIRPLANE	Price paid 350.00 EUR	tickets.pdf (79.8 kB)		Edit

Status

This section gives you an overview of the steps you need to complete before you submit your expenses claim.

Steps you have not yet completed appear in red. Steps you've completed successfully appear in green.

In the example below, only the first and last steps have been completed. This means the bank account is valid, and attendance has been confirmed by the meeting organiser. But 3 steps still appear in red — the *travel details*, the *expenses* and the *supporting documents*.

The claim remains in 'Draft' mode until all steps are complete.

STATUS	DRAF
✓ Your bank account was successfully validated	
X Your travel details are not yet completed	
X You have not provided any expenses for this reimbursement	
X You have not provided at least one supporting document for the expenses	
✓ Your attendance to the meeting has been confirmed	
Status of the reimbursement request. Please verify that all pre-conditions are ok in order to be able to submit your reimbursement request.	

When all steps are complete, they appear in **green text** and the status changes to '*Ready to Submit*'. The button '**Submit claim**' is available:

STATUS	READY TO SUBMIT
✓ Your bank account was successfully validated	
✓ Your attendance to the meeting has been confirmed	
Status of the reimbursement request. Please verify that all pre-conditions are ok in order to be able to submit your reimbursement re	quest.
	❸ Submit reimbursemen

Click on 'Submit claim' to submit the expenses claim for validation.

The following screen will appear with a 'Declaration'.

DECLARATION ON HO	NOUR
I certify that:	
	complete and submitted in due time. I have uploaded all the ion and proofs of expenses and I am submitting it within thi me end of the meeting.
• I have to <b>retain</b> the o	riginal "paper" documents during 6 months before destruction.
	rue and accurate and that <b>I will not be receiving any simila</b> any other or the same institution or public or private organisat journey or stay.
• Once I submit this exp	enses claim I cannot modify it anymore.
More information on our FAQ.	
	Submit expenses claim Cancel

Tick the checkbox to sign the 'Declaration' and click 'Submit reimbursement'.

A green message will appear at the top of the screen confirming that your claim has been submitted and the status will change to '*submitted*'.

TATUS	SUBMITTE
✔ Your bank account was successfully validated	
✓ Your attendance to the meeting has been confirmed	
tatus of the reimbursement request. Please verify that all pre-conditions are ok in order to be able to submit your reimbursement request.	

In the meetings list, the claim also appears as 'submitted':

MEETING	S LIST			
MEETINGS	OTIFICATIONS			
MEETINGS				
Clear filter C	lear sort			
DATE 🔻 💮	MEETING GROUP	MEETING	REIMBURSEMENT	
30/04/2015	CLIMATE	All united Private PARTICIPANTS LIST VALIDATED	ORAFT Please enter bank account details Go to reimbursement	
27/04/2015	Connections	United for the future of our planet Green planet Governmental ATTENDANCE CONFIRMED	SUBMITTED Go to reimbursement	
H 4 1 F	H         1         >         >         >         >         1         -         2 of 2 items         C			

# 2.2.6. Modify expenses claim

The expenses claim must go through a validation procedure. *If there is any problem with your claim,* the organiser will ask you to **modify** it.

You'll receive an email with a link to the expenses claim:

Advanced Gateway to your Meetings	
Dear Jana SMIT,	
The organiser of <b>All United starting on 17/03/2017</b> asks expenses claim because:	s you to correct your
Accommodation expense Supporting document is missing. (Please add your your bill?	)
Please correct and re-submit your expenses claim.	
This is an automated email, so please do not reply.	AGM
Click here for more help on using AGM.	

In the example above, the organiser is asking the participant to modify an expenses claim for the meeting 'All United'. The reason is highlighted in yellow.

Click on the link in the email to access the claim.

The claim is in '*Ready to submit'* mode.

MEETIN	MEETINGS LIST				
MEETINGS	NOTIFICATIONS				
MEETINGS	ò				
Clear filter	Clear sort				
DATE 🔻 🤕	) MEETING GROUP	MEETING	REIMBURSEMENT		
30/04/2015	CLIMATE	All united Private ATTENDANCE CONFIRMED	READY TO SUBMIT Go to reimbursement		
27/04/2015	Connections	United for the future of our planet Green planet Governmental ATTENDANCE CONFIRMED	SUBMITTED Go to reimbursement		
H 4 1 F	H		1 - 2 of 2 items 🕻		

Click on 'Go to expenses claim' and scroll down to the 'Expenses' section.

EXPENSES				
ТҮРЕ	DETAILS	SUPPORTING DOCUMENTS	REQUEST FOR MODIFICATION	
DAILY ALLOWANCE	Duration 1 day (flat rate) × 92.00 €/day Total 92.00 €		Supporting document is missing (please attach a scanned version of your tickets)	Edit 👻

In the column 'Request for modification' you'll see the reason for modification.

Click on the 'Edit' button to make the changes:

Daily allowance expense ×
Number of days
<ul> <li>The daily allowance is a flat rate. It covers all meals and local transport (bus, tram, metro, taxi, parking, motorway tolls, etc.), as well as travel and accident insurance. It amounts to 92 € per day of meeting.</li> <li>If the distance between the place of departure cited in the invitation (be it your private or professional address) is 100 km or less from the place where the meeting is held, the daily allowance shall be reduced by 50%. You shall then only receive 46 € per day of meeting.</li> </ul>
Supporting documents
Select files
Only PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF files are accepted

Click on 'Select files' to upload a file.

Click on '**Update**' to save.

Submit the claim again for validation.

After the organiser validates your expenses claim, the status in the 'Expenses Claim' column will change to 'VALIDATED':

	MEETINGS MEETINGS				
Clear filter	lear sort				
DATE •	MEETING GROUP	MEETING	REIMBURSEMENT		
30/04/2015	CLIMATE	All united Private ATTENDANCE CONFIRMED	(VALIDATED) Go to reimbursement		
27/04/2015	Connections	United for the future of our planet Green planet Governmental ATTENDANCE CONFIRMED	SUBMITTED Go to reimbursement		
H 4 1 > N 1 - 2 of 2 items C					

# 2.3. Notifications

As a correspondent or participant you will receive several *automatic notifications* in AGM. Notifications are sent to *individuals* (actual AGM users).

Along with each notification, you will also receive an email sent to the address you used to create your ECAS account.

The notifications appear in the **notifications tab** when certain actions are carried out.

List of notifications sent to a correspondent List of notifications sent to a participant (expert)

#### 2.3.1. Notifications sent to a correspondent

Go to the AGM website, select the 'Notifications' tab on the main screen:

HOME / N	OTIFICATION	S		6
NOTIF		-		
NOTIFI	CATIONS			
Clear filter	r Clear sort	Expand all Collapse all		
! 🐨	DATE 🔻 🕤	TITLE	LINK	
• 0	29/04/2015	List of participants representing Green planet validated	Green planet	
• 0	28/04/2015	List of participants representing Green planet sent to the organiser - Meeting United for the future of our planet starting on $27/04/2015$	Green planet	
• 🔺	28/04/2015	Request for modifications on the list of participants representing Green planet - United for the future of our planet starting on 27/04/2015	Green planet	
• 0	28/04/2015	List of participants representing Green planet sent to the organiser - Meeting United for the future of our planet starting on $27/04/2015$	Green planet	
H 4 1	► H		1 - 4 of 4 item	is C

Here you can see all notifications sent to you as a correspondent, e.g.:

- confirming that you have sent the list of participants to the meeting organiser,
- reminding you to submit the list of participants even if they are empty,
- telling you that the meeting organiser has asked you to modify the list of participants,
- telling you that the meeting organiser has validated the list of participants.

#### 2.3.2. Notifications sent to a participant

Go to the AGM website, select the 'Notifications' tab on the main screen:

но	HOME / NOTIFICATIONS						
N	от	IF	ICATIO	NS			
ΜE	ETI	NGS	NOTIFIC	ATIONS			
N	ют	IFI	CATIONS				
C	lear	filter	Clear sort	Expand all Collapse all			
	1	۲	DATE V	) TITLE LINK			
+			13/04/2015	Correct your reimbursement request - meeting for our planet group starting on Show reimbursement 13/04/2015			
۲	▲		13/04/2015	Time to complete and submit your reimbursement request - meeting for our planet meeting for our planet group group starting on 13/04/2015			
÷	6		13/04/2015	Participation validated - meeting for our planet group starting on 13/04/2015 planet			
+	6		13/04/2015	Participation proposed - meeting for our planet group starting on 13/04/2015 planet			
H	4	1	► H	1-	4 of 4 items 🖒		

Here you'll see all the notifications sent to you as an expert, e.g.:

- telling you that your name has been put forward to attend a meeting,
- informing that your participation has been validated,
- telling you it's time to submit your expenses claim (if you are entitled to have your expenses reimbursed) you'll receive this when the meeting organiser confirms your participation in the meeting after the meeting has taken place,
- asking you to modify your expenses claim you'll receive this if there is any problem with your claim.,
- confirming the SWIFT **bank transfer** has been made.