



AGM

User Manual

Date: 12/05/2017
Version: 1.2
Software version: v1.40.14

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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 [AGM portal](#) 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.

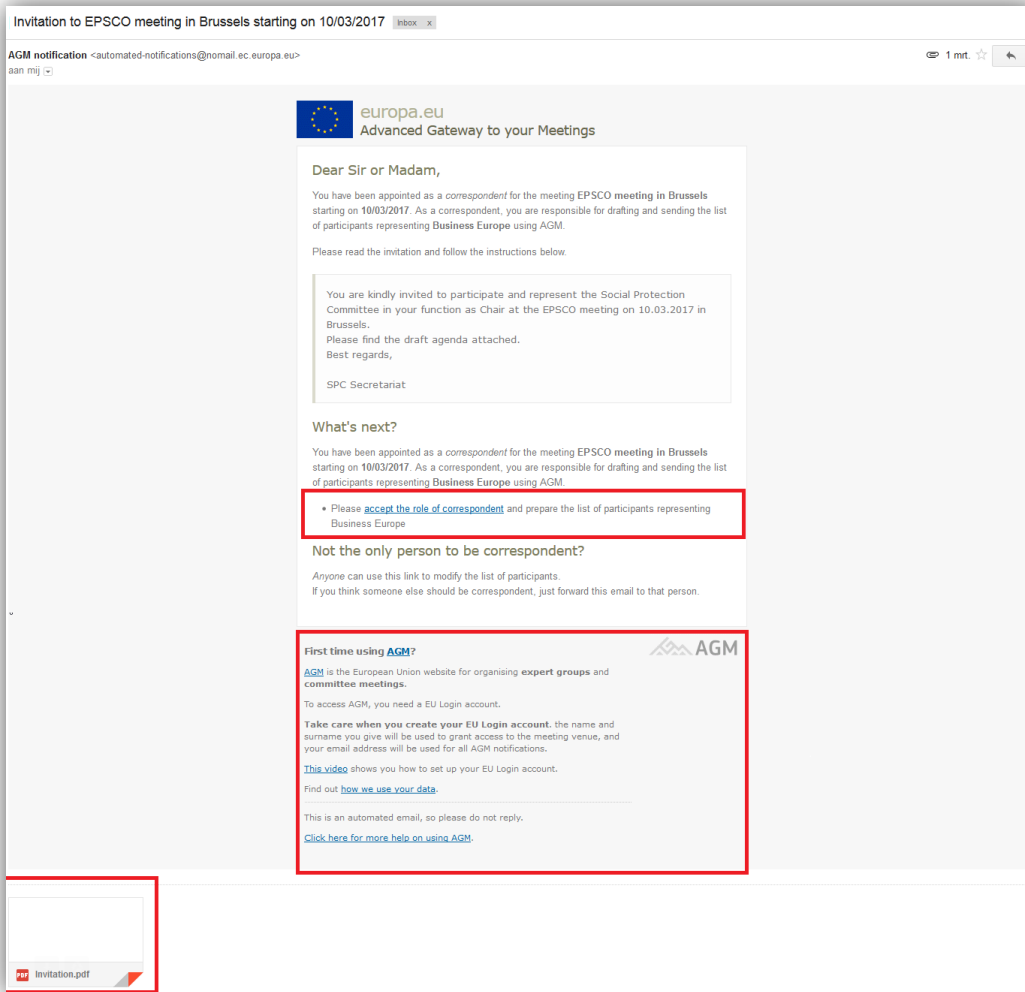
2.1.1. Become a correspondent

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:

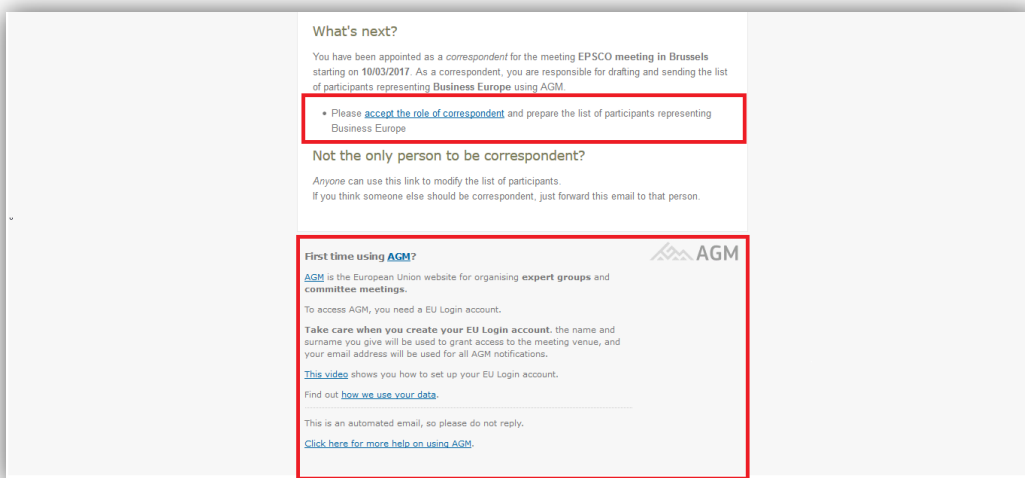
- 1) The invitation with attachments;
- 2) Instructions on how to become a correspondent, and other links for more information.

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.



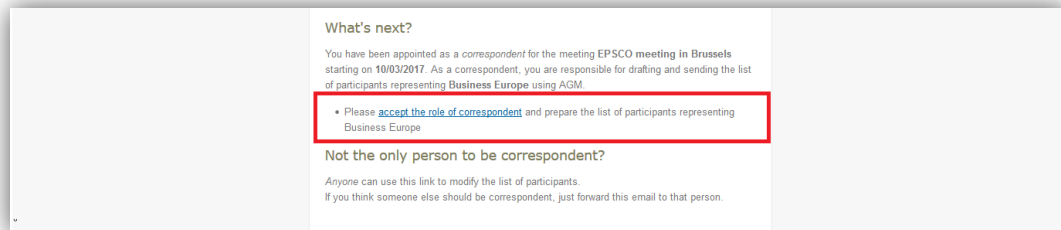
By clicking on this link you will become a correspondent for this meeting.

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**.



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.).

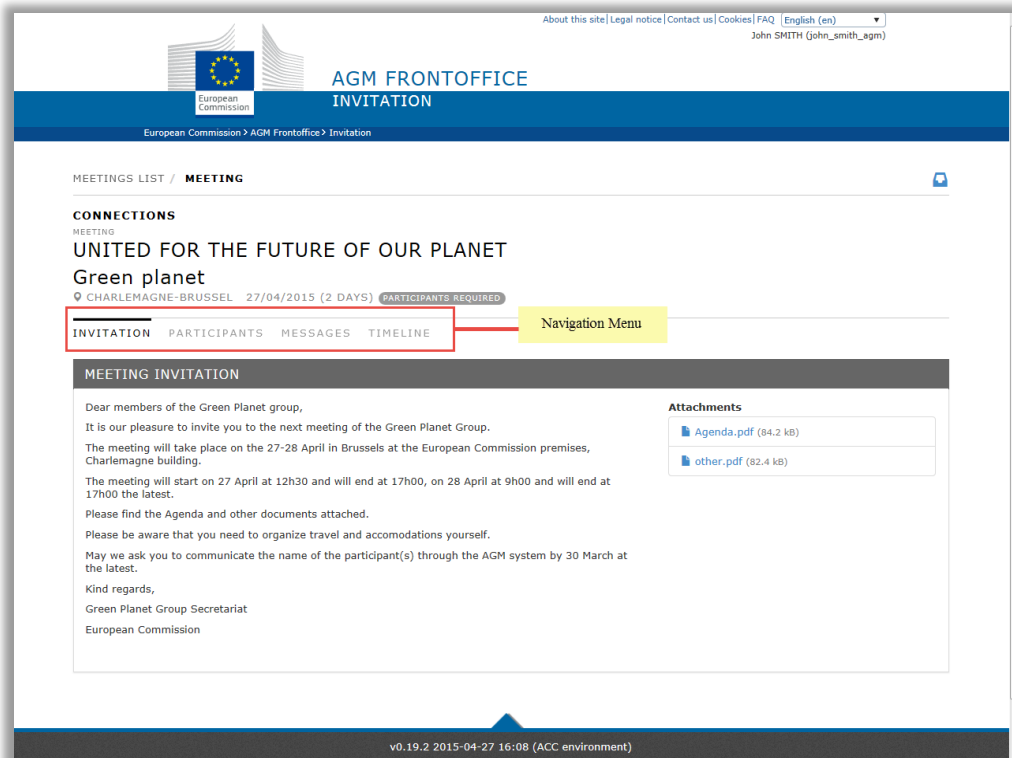
Click on the link in the email to become a **correspondent** for the meeting and to draw up the list of participants in AGM.



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:



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:

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):

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:

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

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'**.

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 ASSIGNMENTS

SPIELBERG, Steven CORRESPONDENT

DELEGATION PARTICIPANTS Send participants

⚠ Please fill in the list of participants and send it to the organiser. If no participants will attend the meeting you must also notify the organiser by sending an empty list.

PARTICIPANT ▲	ORGANISATION	REPRESENTATION	EXPENSES CLAIM	COMING?	
SPIELBERG, Steven NEW	MOF	ITALY Public authority, COUNTRY	✓	✓	Actions ▼
BELLUCCI, Monica NEW	Ministry	ITALY Public authority, COUNTRY	✓	?	Actions ▼
SMITH, Ellen NEW	Ministry of Finance	ITALY Public authority, COUNTRY	✓	?	Actions ▼

ADD PARTICIPANT

from the last 5 meetings as a new participant 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 [notification](#) 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.



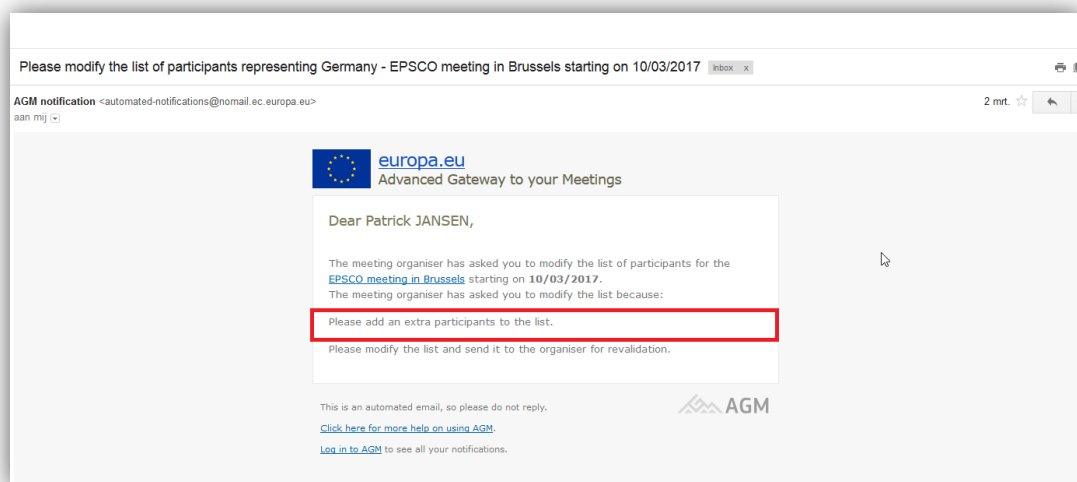
2.1.3. Edit the list of participants

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:



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.

INVITATION PARTICIPANTS MESSAGES TIMELINE

CORRESPONDENTS
SMITH, John

DELEGATION PARTICIPANTS [Send participants](#)

PARTICIPANT ▲	ORGANISATION	COUNTRY	REIMBURSEMENT	ATTENDANCE	
1 Hill, Loreen SAVED	Green Planet	United Kingdom	✓	?	Actions ▼
2 Mayer, Helmut SAVED	Green Planet	United Kingdom	✗	?	Actions ▼
3 Smith, Ellen SAVED	Green Planet	United Kingdom	✗	?	Edit Remove Actions ▼

ADD PARTICIPANT

from the last 5 meetings ▼
 as a new participant of this member

First name Last name
 Email Organisation
 Country Request for reimbursement
Represented country

[Cancel](#) [Add](#)

HISTORY OF PARTICIPANT LISTS [Show participants](#)

28/04/2015 PARTICIPANTS SENT by SMITH, John

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

INVITATION PARTICIPANTS MESSAGES TIMELINE

CORRESPONDENTS
SMITH, John

DELEGATION PARTICIPANTS [Send participants](#)

PARTICIPANT ▲	ORGANISATION	COUNTRY	REIMBURSEMENT	ATTENDANCE	
1 Hill, Loreen SAVED	Green Planet	United Kingdom	✓	?	Actions ▼
2 Mayer, Helmut REMOVED	Green Planet	United Kingdom	✗	?	Actions ▼
3 Smith, Ellen SAVED	Green Planet	United Kingdom	✗	?	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 [X]

Representation level ⓘ

Country ⓘ
 Other public body ⓘ
 EU Body ⓘ
 International organisation ⓘ

Country (country represented) ⓘ

Italy [v]

Public administration name ⓘ

Ministry of Finance

First name

Ellen

Last name

Smith

Email

ellen.smith.agora@gmail.com

Entitled to claim expenses

Coming?

Yes No

[✓] Update [✗] Cancel

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).

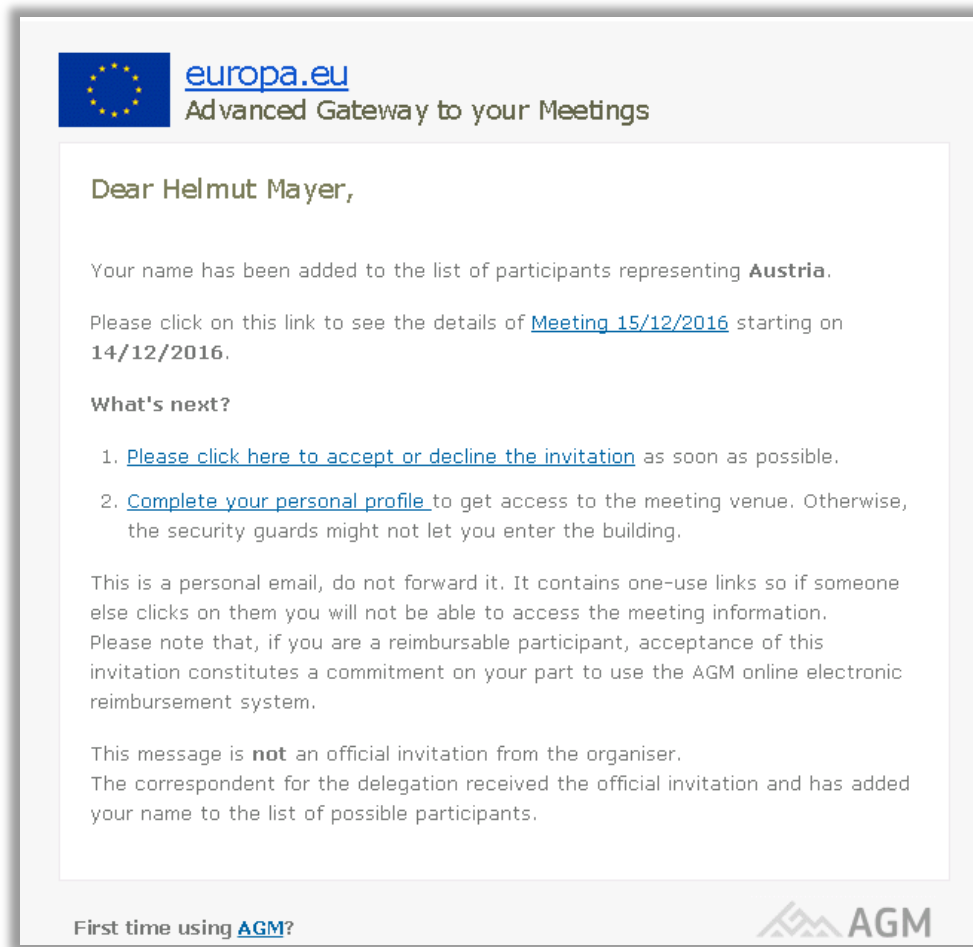
The participant will receive an email suggesting they attend a meeting, with a link to AGM.

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.

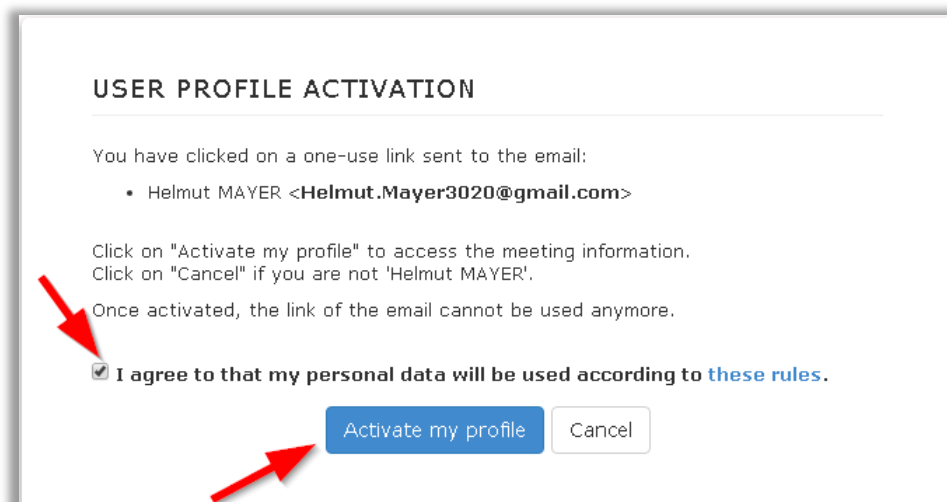
This email includes a link to **activate your user profile** for that meeting.

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

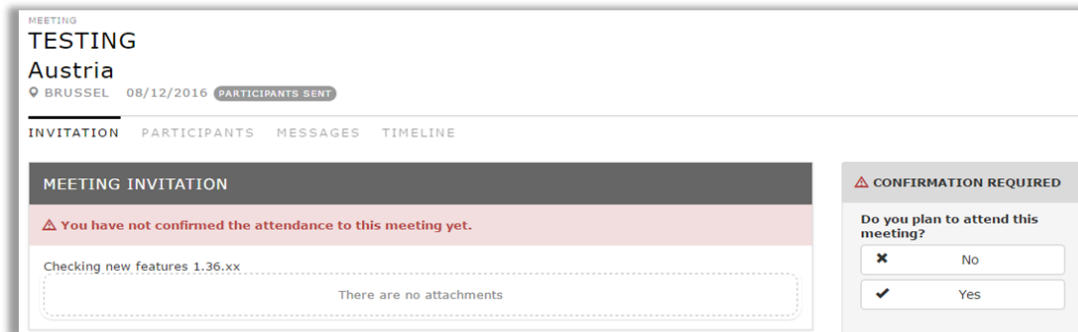
Click on the link with the meeting invitation name and log in using your ECAS account. The first time you open a meeting, you'll need to link the meeting to your user profile. You'll have to do this **once** *for each meeting* group.



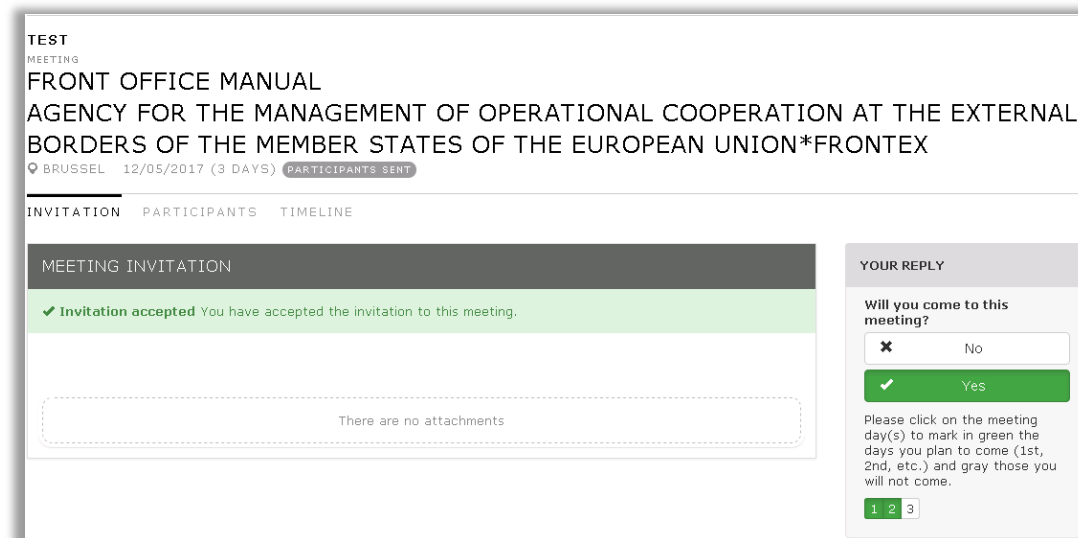
Click on 'Activate my profile', then the meeting invitation appears.

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

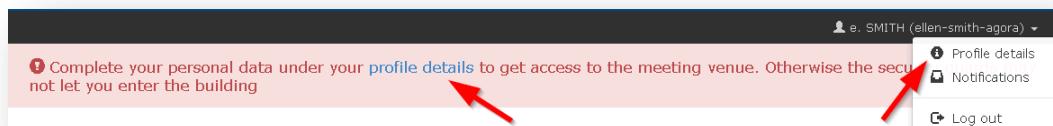
Under the meeting invitation title you'll see the message **'You have not confirmed the attendance to this meeting yet.'**



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.



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



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'.

Complete the 'Identity documents' section:

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

The screenshot shows the 'IDENTITY DOCUMENTS' section of a user interface. At the top left, there is a button labeled 'Add new document...'. Below it is a table with columns: TYPE, NUMBER, EXPIRY DATE, and COUNTRY OF ISSUE. The 'TYPE' column has a dropdown menu open, showing options: 'Select a document type...', 'Identity card', 'Passport number', and 'Driving license'. The 'NUMBER' column has an empty text input field. The 'EXPIRY DATE' column has an empty date picker. The 'COUNTRY OF ISSUE' column has a dropdown menu with 'Select country...' and a flag icon. To the right of the table are two buttons: 'Update' (with a checkmark icon) and 'Cancel' (with an 'X' icon). A red arrow points to the 'Add new document...' button, and a red box highlights the 'Update' button.

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.

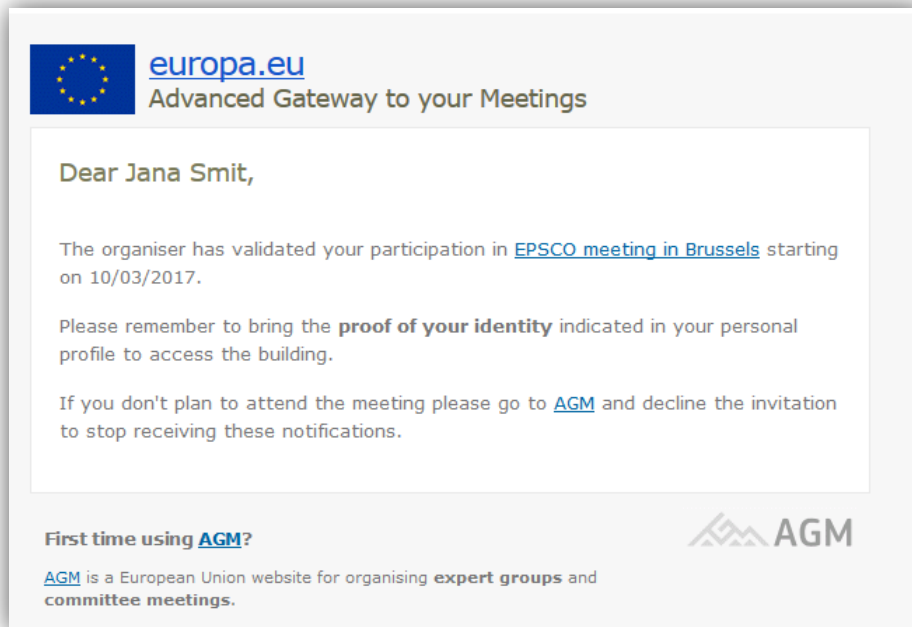
The screenshot shows the 'IDENTITY DOCUMENTS' section with a table containing one row of data. The table has columns: TYPE, NUMBER, EXPIRY DATE, and COUNTRY OF ISSUE. The row contains: 'Identity card', 'Z123478', '20/08/2020', and 'United Kingdom' (with a flag icon). To the right of the table is an 'Edit' button with a dropdown arrow.

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.

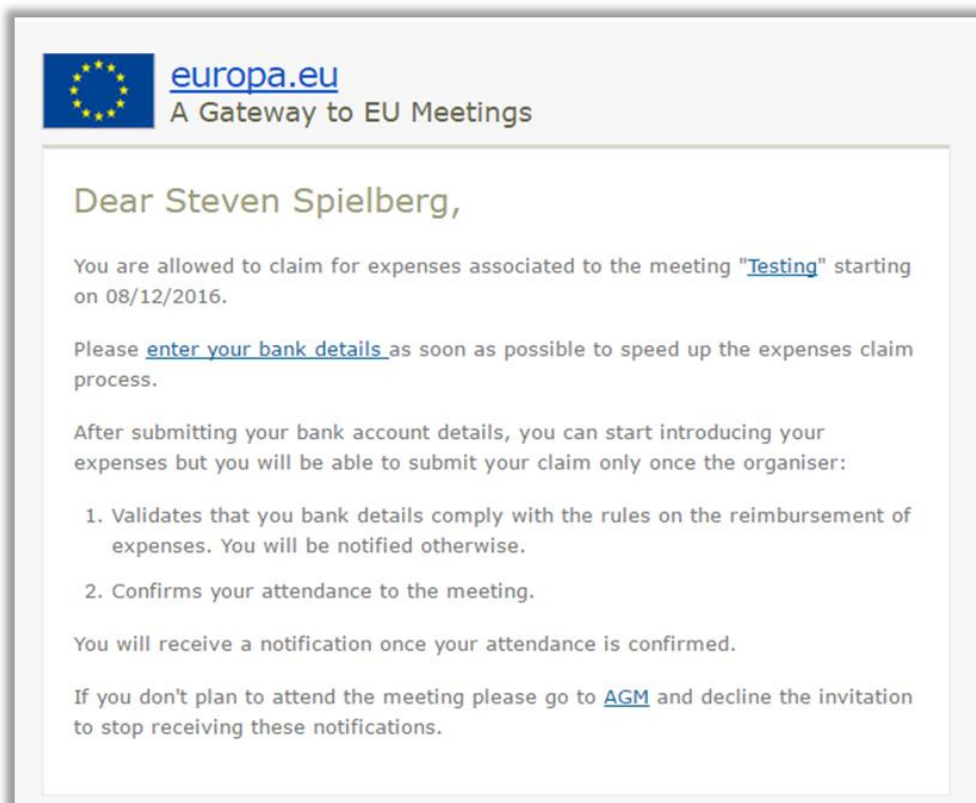
2.2.2. Enter payment details

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*.



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

MEETINGS LIST			
DATE	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

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 [Complete and submit expenses claim](#). This section only explains how to **enter your bank details.**)

MEETINGS LIST / REIMBURSEMENT

CONNECTIONS
MEETING
UNITED FOR THE FUTURE OF OUR PLANET
Green planet
CHARLEMAGNE-BRUSSEL 27/04/2015 CEST (2 DAYS)

DETAILS **BANK ACCOUNT**

MEETING DETAILS

Delegation
Green planet Governmental
Expert
HILL, Ioreen
Organisation
Green Planet United Kingdom

Attended sessions
X
Reimbursement
DRAFT

TRAVEL DETAILS

Place of work Country

DEPARTURE → **ARRIVAL**

OUTWARD →

RETURN →

Expert's comments

Cancel Save

EXPENSES

No expenses have been added yet

Select expense type...

STATUS DRAFT

X Your bank account for this reimbursement is not yet completed

X Your travel details are not yet completed

X You have not provided any expenses for this reimbursement

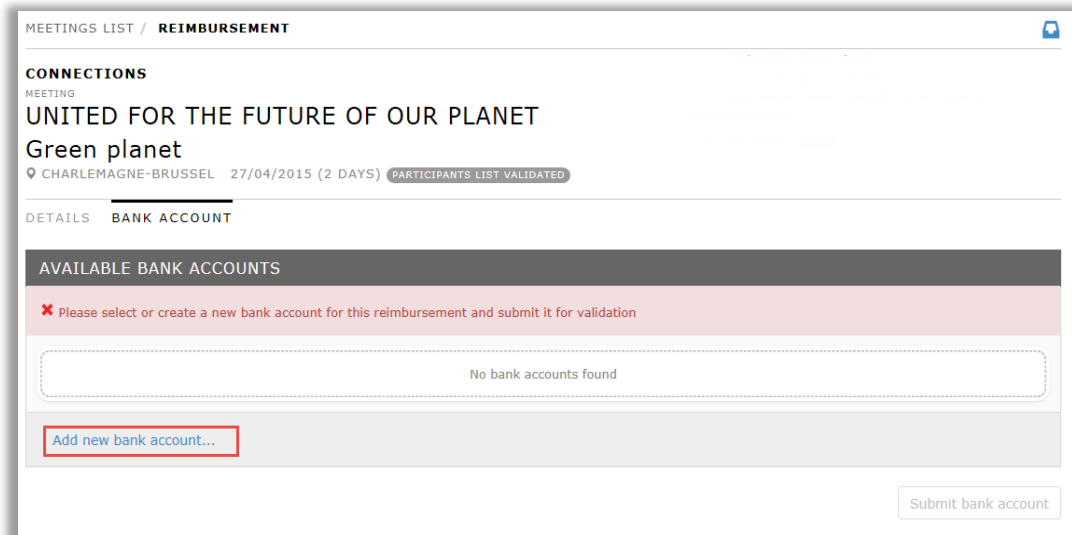
X You have not provided at least one supporting document for the expenses

X Your attendance to the meeting has not yet been confirmed, therefore you cannot send your reimbursement request yet

Status of the reimbursement request. Please verify that all pre-conditions are ok in order to be able to submit your reimbursement 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.

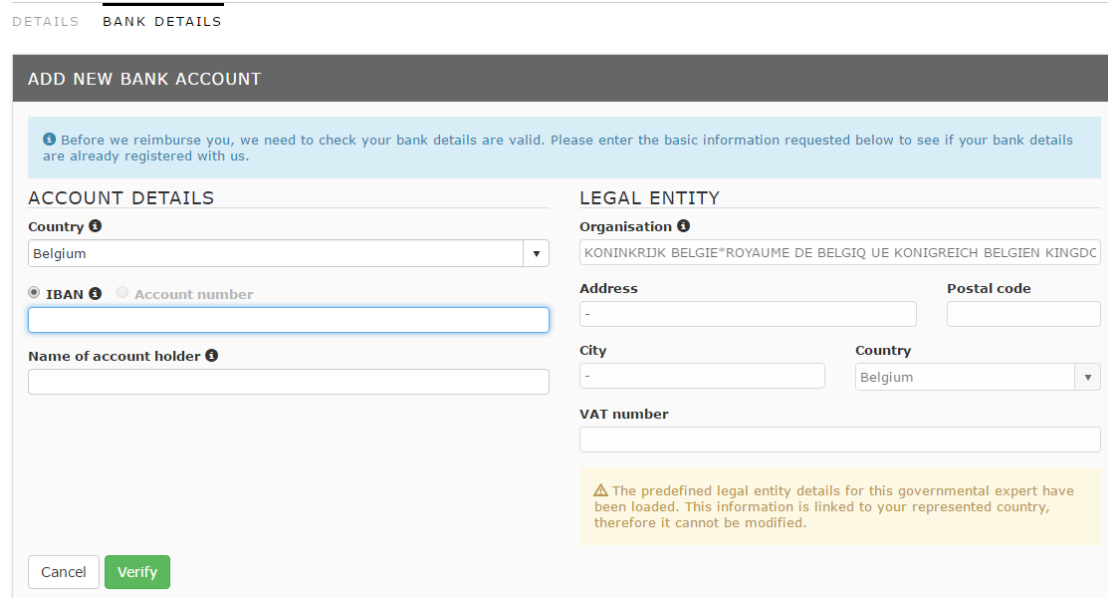


This screen shows the bank accounts you’ve used for different expenses claims.

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:



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 ec-agm-support@ec.europa.eu 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	LEGAL ENTITY DETAILS	COMPLIANCE
<p>Bank country Belgium</p> <p>IBAN BE13360107673339</p> <p>Name of account holder UNIVERSITY OF BRUSSEL</p>	<p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM</p> <p>Address -</p> <p>Postal code -</p> <p>City -</p> <p>Country Belgium</p> <p>VAT number -</p> <p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BE LGIUM</p>	<p>Bank account details not yet used</p>

BANK ACCOUNT DEROGATION ?

IS THE SELECTED BANK ACCOUNT IN THE NAME OF THE MEMBER STATE, ONE OF ITS MINISTRIES OR A PUBLIC BODY?

Yes (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

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:

ADD NEW BANK ACCOUNT

i This bank account is not yet registered with us. You need to register your account so that we can refund your expenses to it. To register your account, enter all the information requested and click 'Save'. Otherwise, click 'Cancel'.

<h4>ACCOUNT</h4> <p>Account name i</p> <input type="text" value="PRIMARY"/> <p>IBAN i</p> <input type="text" value="GB29NWBK60161331926819"/> <p>BIC / Swift Code i</p> <input type="text"/> <p>Currency i</p> <input type="text" value="EUR - EURO"/>	<h4>LEGAL ENTITY</h4> <p>Organisation i</p> <input type="text" value="KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGD"/> <p>Address</p> <input type="text" value="-"/> <p>Postal code</p> <input type="text"/> <p>City</p> <input type="text" value="-"/> <p>Country</p> <input type="text" value="Belgium"/> <p>VAT number</p> <input type="text"/>
--	---

⚠ The predefined legal entity details for this governmental expert have been loaded. This information is linked to your represented country, therefore it cannot be modified.

<h4>ACCOUNT HOLDER</h4> <p>Name of account holder i</p> <input type="text" value="PROD UK"/> <p>Address i</p> <input type="text" value="STREET"/> <p>PO box number i</p> <input type="text" value="1"/> <p>Postal code i</p> <input type="text" value="1000"/> <p>City i</p> <input type="text" value="LONDON"/> <p>Country i</p> <input type="text" value="United Kingdom"/>	<h4>BANK BRANCH</h4> <p>Bank name</p> <input type="text" value="BARKLEYS BANK"/> <p>Address i</p> <input type="text" value="STREET"/> <p>PO box number i</p> <input type="text" value="1"/> <p>Postal code i</p> <input type="text" value="1000"/> <p>City i</p> <input type="text" value="LONDON"/> <p>Country i</p> <input type="text" value="United Kingdom"/>
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<h4>ACCOUNT MANAGEMENT</h4> <p>I certify that I am</p> <p><input type="radio"/> the account holder <input checked="" type="radio"/> NOT the account holder</p> <div style="background-color: #e0f0ff; padding: 5px; margin-top: 5px;"> <p>i As you are not the account holder, please print out this form, ask the account holder to sign it and upload a scanned version. If possible, please also provide a recent bank statement. If you cannot provide a statement, please ask the bank to sign this form before you upload it</p> </div> <p style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Save"/> </p>	<h4>RECENT BANK STATEMENT</h4> <p>Please upload a recent bank statement (from the last 6 months). The bank statement should confirm the information you've entered under 'Account name', 'Account number/IBAN' and 'Bank name', otherwise we cannot validate it</p> <p style="text-align: center;"> <input type="button" value="Select files..."/> </p> <p style="font-size: 0.8em;">Only file types PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF are accepted.</p>
---	--

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:

<h4>ACCOUNT DETAILS</h4> <p>Bank country United Kingdom</p> <p>IBAN GB29NWBK60161331926819</p> <p>Account name PRIMARY</p> <p>Name of account holder PROD UK</p> <p>Bank name BARKLEYS BANK</p> <p style="text-align: center; background-color: #333; color: white; padding: 2px;">Select this bank details</p>	<h4>LEGAL ENTITY DETAILS</h4> <p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BELGIUM</p> <p>Address -</p> <p>Postal code -</p> <p>City -</p> <p>Country Belgium</p> <p>VAT number -</p> <p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BELGIUM</p>	<h4>VALIDATION STEPS</h4> <p>i 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</p> <p style="text-align: right;"> <input type="button" value="Upload signed form"/> <input type="button" value="Remove"/> </p>
--	---	---

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

<p>ACCOUNT DETAILS</p> <p>Bank country United Kingdom</p> <p>IBAN GB29NWBK60161331926819</p> <p>Account name PRIMARY</p> <p>Name of account holder PROD UK</p> <p>Bank name BARKLEYS BANK</p> <p>Signed form BA-IDENTIFICATION.pdf (22.0 kB)</p>	<p>LEGAL ENTITY DETAILS</p> <p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BELGIUM</p> <p>Address -</p> <p>Postal code -</p> <p>City -</p> <p>Country Belgium</p> <p>VAT number -</p> <p>Organisation KONINKRIJK BELGIE*ROYAUME DE BELGIQ UE KONIGREICH BELGIEN KINGDOM OF BELGIUM</p>	<p>COMPLIANCE</p> <p>Bank account details not yet used</p>
--	--	--

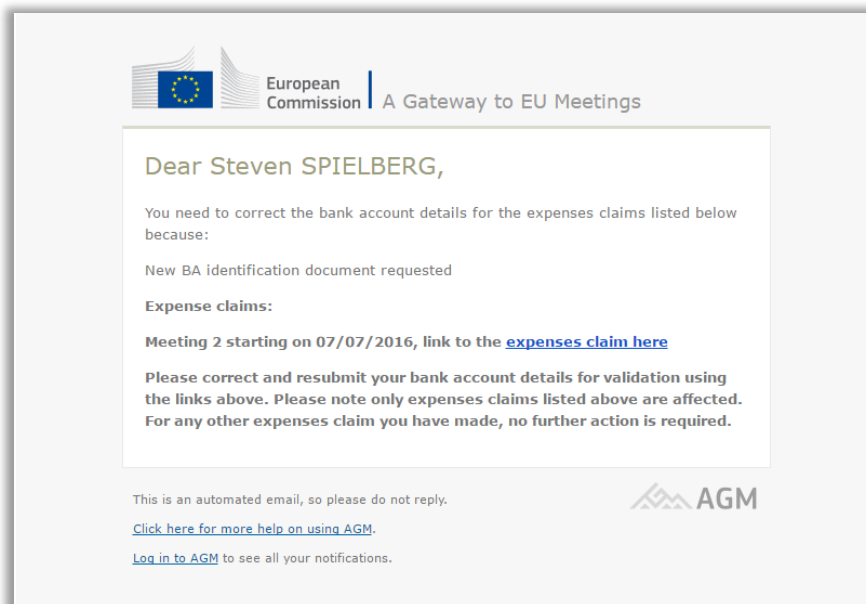
BANK ACCOUNT DEROGATION ⓘ

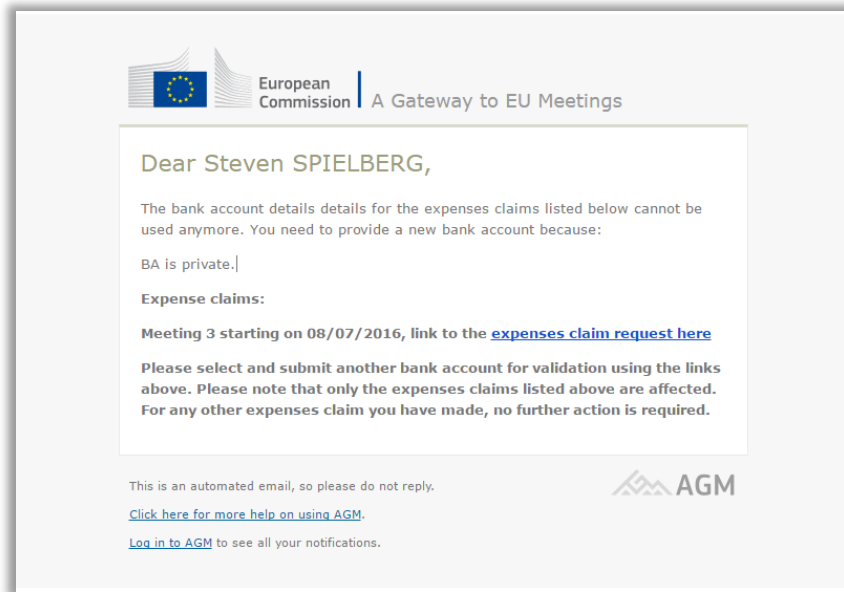
IS THE SELECTED BANK ACCOUNT IN THE NAME OF THE MEMBER STATE, ONE OF ITS MINISTRIES OR A PUBLIC BODY?

Yes (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

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:





2.2.2.2. Add new BA for Private Experts

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

DETAILS BANK DETAILS

ADD NEW BANK ACCOUNT

Before we reimburse you, we need to check your bank details are valid. Please enter the basic information requested below to see if your bank details are already registered with us.

ACCOUNT DETAILS

Country

IBAN Account number

Name of account holder

LEGAL ENTITY

Organisation

Address Postal code

City Country

VAT number

Cancel Save

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 CREATION

<p>ACCOUNT DETAILS</p> <p>Bank country Ireland</p> <p>IBAN IE35AIBK93105539523030</p> <p>Name of account holder IRISH NATIONAL TEACHERS ORGANISATION NO 1 ACCOUNT</p>	<p>LEGAL ENTITY DETAILS</p> <p>Organisation Irish national teachers organisation</p> <p>Address Parnell street</p> <p>Postal code 1</p> <p>City Dublin</p> <p>Country Ireland</p> <p>VAT number -</p>
--	---

Are you sure you want to add this bank account to your list of bank accounts? This bank account will be linked to your expenses claim after you select it and will be sent to us for validation

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

CONFIRM BANK DETAILS CREATION

<p>ACCOUNT DETAILS</p> <p>Bank country Ireland</p> <p>IBAN IE35AIBK93105539523030</p> <p>Name of account holder IRISH NATIONAL TEACHERS ORGANISATION NO 1 ACCOUNT</p>	<p>LEGAL ENTITY DETAILS</p> <p>Organisation Irish national teachers organisation</p> <p>Address Parnell street</p> <p>Postal code 1</p> <p>City Dublin</p> <p>Country Ireland</p> <p>VAT number -</p>
--	---

Are you sure you want to add this bank account to your list of bank accounts? This bank account will be linked to your expenses claim after you select it and will be sent to us for validation

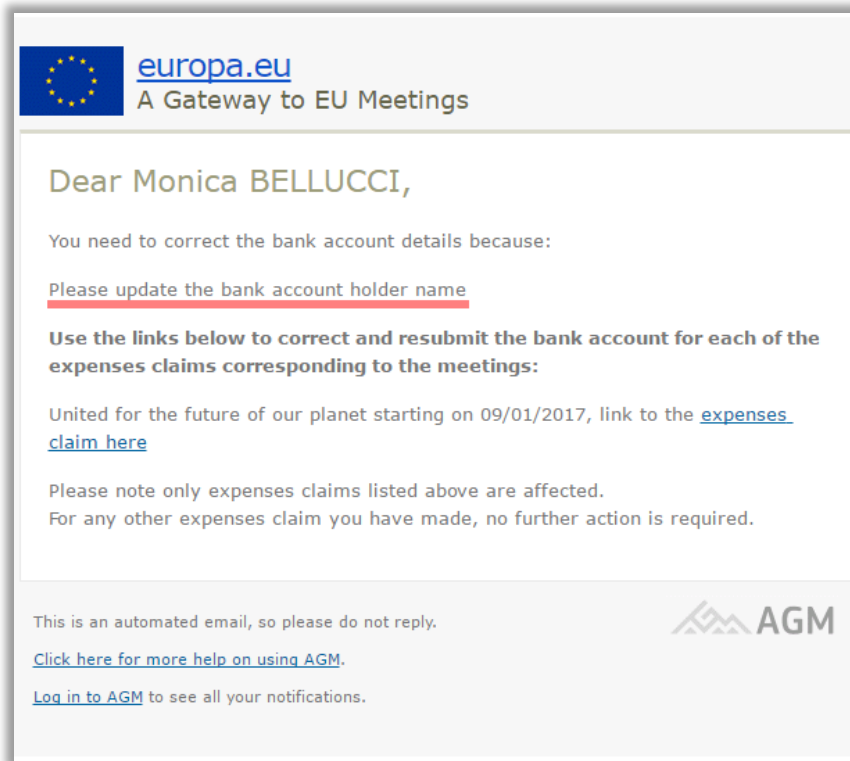
2.2.3. Modifying bank account details

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.

[Here](#) you can see that the expert accidentally entered her *own name* instead of the *company name* when entering her bank account details.



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.

ACCOUNT DETAILS	LEGAL ENTITY DETAILS	COMPLIANCE
<p>Bank country Ireland</p> <p>IBAN IE35AIBK93105539523030</p> <p>Name of account holder IRISH NATIONAL TEACHERS ORGANIZATION NO 1 ACCOUNT</p> <p>Select this bank details</p>	<p>Organisation Irish national teachers organisation</p> <p>Address Parnell street</p> <p>Postal code 1</p> <p>City Dublin</p> <p>Country Ireland</p> <p>VAT number -</p>	<p>Bank account details not yet used</p>
		<p>Edit</p>

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

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	LEGAL ENTITY DETAILS	COMPLIANCE
Bank country Germany IBAN DE3151250000001019244 Account holder KLINIKEN DES HOCHTAUNUSKREISESGMBH	Organisation BUNDESREPUBLIK DEUTSCHLAND*REPUBLIQUE FEDERALE D ALLEMAGNE FEDERAL REPUBLIC OF GERMANY Address - Postal code - City - Country Germany VAT number - Organisation BUNDESREPUBLIK DEUTSCHLAND*REPUBLIQUE FEDERALE D ALLEMAGNE FEDERAL REPUBLIC OF GERMANY	Used in meeting groups <ul style="list-style-type: none"> • BUDG -AGM ACCEPTANCE

BANK ACCOUNT DEROGATION ⓘ

IS THE SELECTED BANK ACCOUNT IN THE NAME OF THE MEMBER STATE, ONE OF ITS MINISTRIES OR A PUBLIC BODY?

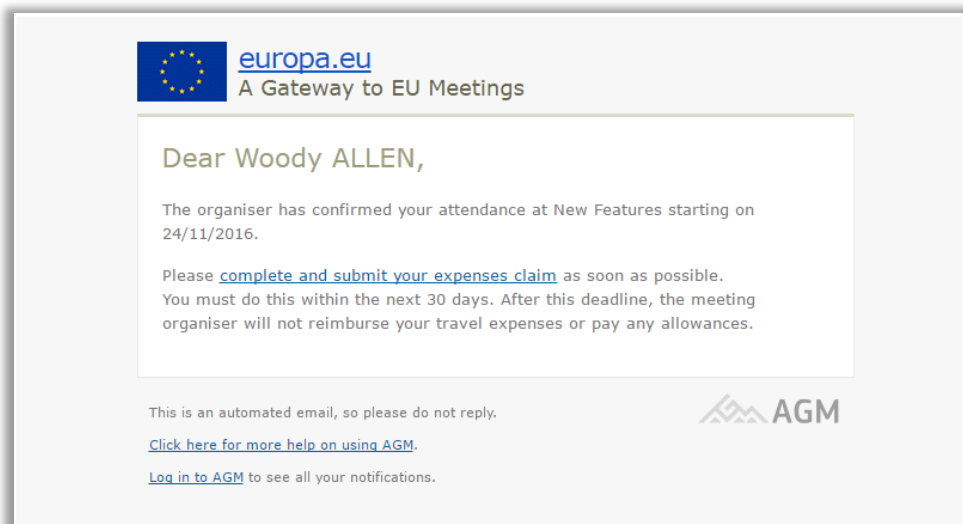
Yes (You can submit your the bank details for validation)
 No (You need to provide evidence that you have permission from your member state, one of its ministries or a public body to use this bank account)

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.



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 [how to edit your bank account details](#) here.

The expenses claim form has 3 main sections:

[Travel details](#)

[Expenses](#)

[Status](#)

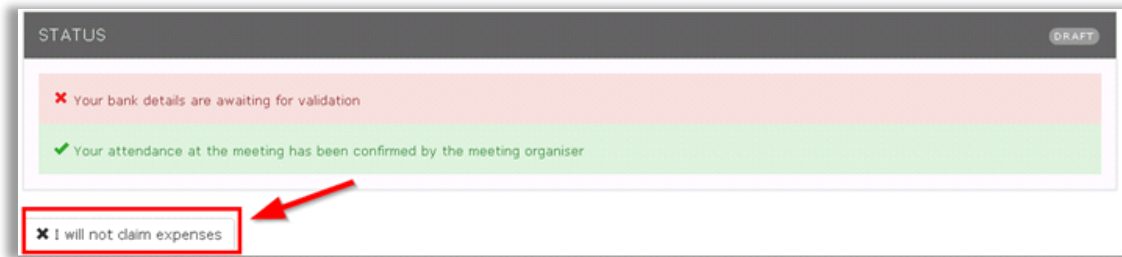
In the top right-hand corner, the **attended sessions** appear, as confirmed by the meeting organiser.

The screenshot displays the 'REIMBURSEMENT' form for a meeting titled 'UNITED FOR THE FUTURE OF OUR PLANET Green planet'. The form is divided into several sections:

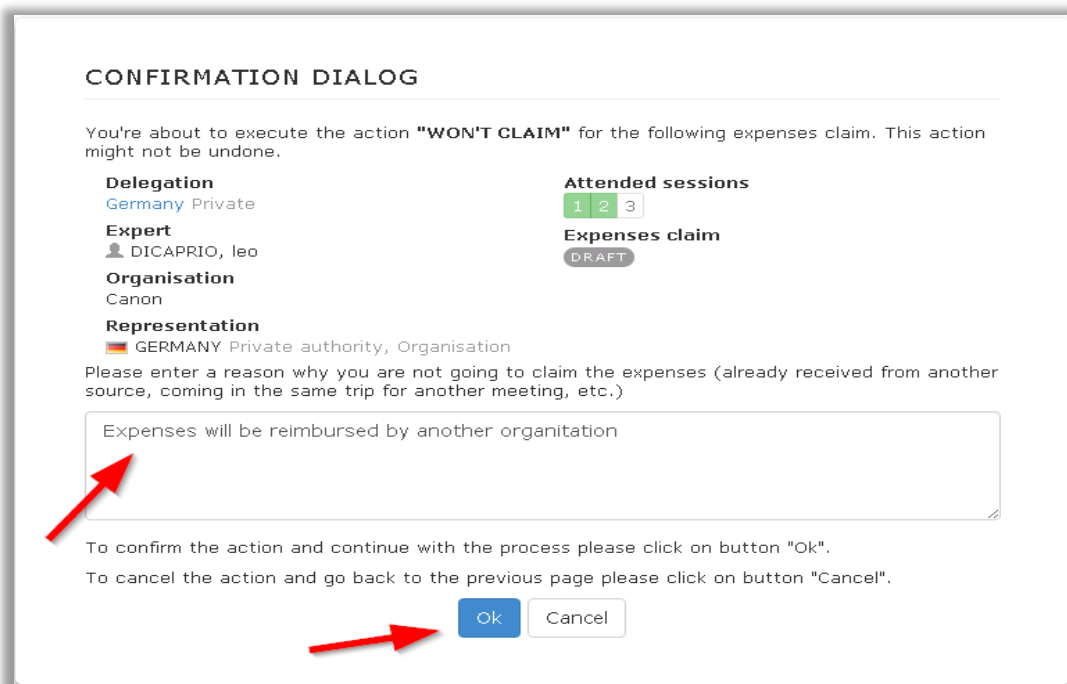
- MEETING DETAILS:** Shows the meeting name, location (CHARLEMAGNE-BRUSSEL), dates (27/04/2015 CEST (2 DAYS)), and delegation information (Green planet Governmental, Expert HILL, Ioreen, Organisation Green Planet United Kingdom). A 'Reimbursement' button is marked as 'DRAFT'. A red box highlights the 'Attended sessions' section, which shows '1 2'.
- TRAVEL DETAILS:** Contains input fields for 'Place of work', 'Country', 'DEPARTURE' (OUTWARD and RETURN), and 'ARRIVAL' (OUTWARD and RETURN). It also includes an 'Expert's comments' text area and 'Cancel' and 'Save' buttons.
- EXPENSES:** Displays the message 'No expenses have been added yet' and a 'Select expense type...' dropdown menu with an 'Add expense' button.
- STATUS:** Shows the overall status of the reimbursement request. It includes a 'DRAFT' label and a list of messages:
 - ✓ Your bank account was successfully validated
 - ✗ Your travel details are not yet completed
 - ✗ You have not provided any expenses for this reimbursement
 - ✗ You have not provided at least one supporting document for the expenses
 - ✓ Your attendance to the meeting has been confirmed

At the bottom, a note states: 'Status of the reimbursement request. Please verify that all pre-conditions are ok in order to be able to submit your reimbursement request.'

On the bottom of the expense claim you have an option "x 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":



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).

TRAVEL DETAILS

Place of work Country

The place of departure differs from the place of work and/or the place specified in the invitation letter ⓘ

	DEPARTURE	→	ARRIVAL
OUTWARD	<input type="text"/>	→	<input type="text"/>
RETURN	<input type="text"/>	→	<input type="text"/>

Expert's comments

Edit

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'**.

EXPENSES

No expenses have been added yet

Accommodation

- Accommodation
- Daily allowance
- Airplane
- Train
- Private car
- Other transport

+ Add expense

DRAFT

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 **at least one** supporting document for each expenses claim).

Accommodation expense
✕

Number of nights

- If you have to spend one or more nights at the place where the meeting is held because the times of meetings are incompatible with the times of flights or trains, you shall also be entitled to an accommodation allowance. This allowance shall be 100 € per night. The number of nights may not exceed the number of meeting days + 1.
- An additional accommodation allowance and/or daily allowance may, exceptionally, be paid if prolonging the stay would enable you to obtain a reduction in the cost of transport worth more than the amount of these allowances.

Supporting documents

Only PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF files are accepted

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.

Daily allowance expense
✕

Number of days

- 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.
- 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.

Supporting documents

Done ✔

tickets.pdf (79.8 kB) ✕

Only PDF, JPG, JPEG, PNG, TIF, TIFF, BMP and GIF files are accepted

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.

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 **'Request for Modifications'** column.

EXPENSES				
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 DRAFT

- ✓ Your bank account was successfully validated
- ✗ Your travel details are not yet completed
- ✗ You have not provided any expenses for this reimbursement
- ✗ 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 request.

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

The following screen will appear with a **'Declaration'**.

DECLARATION ON HONOUR

I certify that:

- The expenses claim is complete and submitted in due time. **I have uploaded all the required documentation and proofs of expenses** and I am submitting it within thirty calendar days* from the end of the meeting.
- I have to **retain** the original "paper" documents during **6 months** before destruction.
- These particulars are true and accurate and that **I will not be receiving any similar reimbursement** from any other or the same institution or public or private organisation in respect of the same journey or stay.
- Once I submit this expenses claim **I cannot modify it anymore**.

* More information on our FAQ.

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'**.

STATUS SUBMITTED

- ✓ 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 request.

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


MEETINGS LIST			
MEETINGS		NOTIFICATIONS	
MEETINGS			
Clear filter	Clear sort		
DATE ▼	MEETING GROUP	MEETING	REIMBURSEMENT
30/04/2015	CLIMATE	All united Private PARTICIPANTS LIST VALIDATED	DRAFT 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

1 - 2 of 2 items

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:



europa.eu
Advanced Gateway to your Meetings

Dear Jana SMIT,

The organiser of **All United** starting on **17/03/2017** asks you to correct your expenses claim because:


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.

[Click here for more help on using AGM.](#)

[Log in to AGM](#) to see all your notifications.



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.

MEETINGS LIST			
MEETINGS		NOTIFICATIONS	
MEETINGS			
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

1 - 2 of 2 items

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

EXPENSES				
TYPE	DETAILS	SUPPORTING DOCUMENTS	REQUEST FOR MODIFICATION	
DAILY ALLOWANCE	Duration 1 day (flat rate) x 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

- 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.
- 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.

Supporting documents

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'**:

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

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:

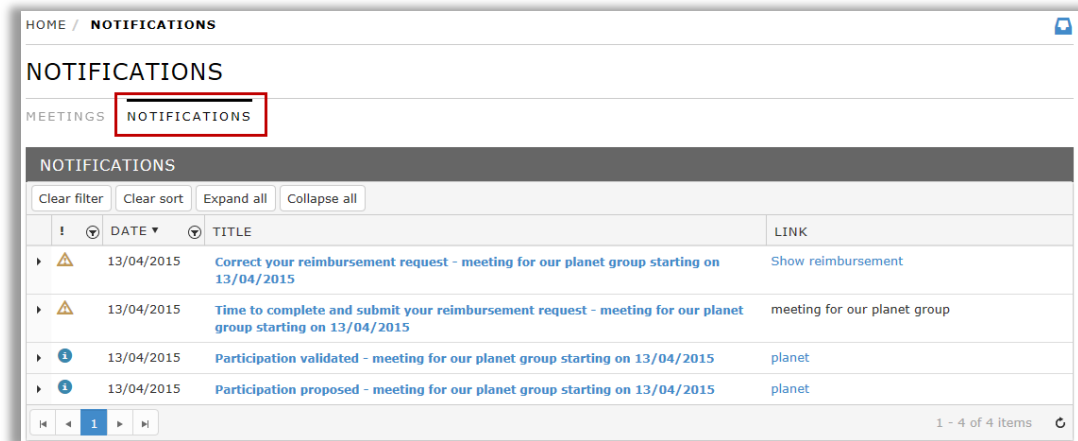
DATE	TITLE	LINK
29/04/2015	List of participants representing Green planet validated	Green planet
28/04/2015	List of participants representing Green planet sent to the organiser - Meeting United for the future of our planet starting on 27/04/2015	Green planet
28/04/2015	Request for modifications on the list of participants representing Green planet - United for the future of our planet starting on 27/04/2015	Green planet
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

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:



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.