

# **Horizon 2020**

## **Research and Innovation Action**

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# **NFFA-Europe Pilot**

**Guidelines for Claiming Travel and Subsistence  
Costs within Transnational Access Activity**

## **A practical Guide for Users**

**For further info: [uonet@nffa.eu](mailto:uonet@nffa.eu) – Update as of August 2024**



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# INTRODUCTION

This document serves as a comprehensive guide for users on how to claim travel and subsistence costs incurred while participating in the NFFA-Europe Pilot's Transnational Access Activity. As part of the EU-funded Horizon 2020 INFRAIA-2018-2020 Programme, NFFA-Europe supports this activity through a consortium of 20 cutting-edge research infrastructures that make up the Interoperable Distributed Research Infrastructure for Nanoscience (IDRIN), coordinated by CNR-IOM under the leadership of Prof. Giorgio Rossi.

IDRIN provides researchers from academia, research institutions, and industry **access free of charge** to advanced research facilities. Additionally, it offers a **partial contribution towards the reimbursement of travel and subsistence (T&S) costs** for transnational access users, helping to alleviate their expenses. In line with the EU principles of co-funding and non-profit, NFFA-Europe imposes ceilings on reimbursements to extend financial support to a larger number of users.

Reimbursements are conducted in compliance with national and institutional regulations and are based on the accounting standards and procedures in force at the access provider's site. Users should be aware that reimbursement policies may vary depending on the location and specific rules of the access provider.

## SCOPE

NFFA-Europe provides researchers from Europe and other countries with the opportunity to conduct extensive multidisciplinary research projects at the nanoscale. The initiative covers a broad range of research activities, including lithography, growth, nano-characterization, theory, and simulation.

Researchers will be able to perform access sessions in six different types of Installations: (a) Lithography & Patterning (Litho/Patt); (b) Growth & Synthesis (Grow/Synth); (c) Structural & Morphology Characterisation (Struct/Morph); (d) Electronic & Chemical & Magnetic Characterisation (Ele/Chem/Mag); (e) Nano to Micro/Macro (nm to mm); and (f) Theory and Simulation (Theory).

Researchers can access these facilities located at various NFFA-Europe sites. Proposals must request access to more than one type of installation, for example, combining Litho/Patt with Grow/Synth, or Struct/Morph Characterisation with Ele/Chem/Mag Characterisation. Single-installation proposals are not accepted unless combined with other types of access. If required by the proposal, limited access to co-located large-scale facilities for Fine Analysis can be offered in the Struct/Morph and the Ele/Chem/Mag characterisation installations.

The Technical Liaison Network (TLNet) may allocate a single access site for all project phases, though multi-site projects involving various locations are also possible.



The process begins with the submission of a proposal through the Single-Entry Point (SEP) on the NFFA-Europe website. The SEP provides a comprehensive list of tools and methods available and allows for the submission of detailed proposals. After submission, the TLNet performs eligibility checks and assesses the technical feasibility of each project. Proposals that pass this stage are forwarded to the Access Review Panel for peer review and final ranking. The highest-ranking proposals are awarded access, providing free-of-charge access to the most suitable methods and instruments for research.

The EU financial support to trans-national access covers the access costs incurred by the access providers to provide access to the selected researchers and the partial refund of travel and subsistence costs incurred by the researchers to visit the infrastructure.

## GENERAL RULES AND PROCEDURES

### EC AND PROJECT RULES

Reimbursement for travel and subsistence (T&S) costs for transnational access users is a partial contribution towards their expenses. Based on the EU principles of co-funding and non-profit, NFFA-Europe sets ceilings on refunds to extend financial support to more users. In compliance with national and institutional legislations, reimbursements are based on the accounting standards and procedures in force at the access provider's site. Users should be aware that reimbursement rules and procedures may vary from site to site due to local regulations and practices.

EU funding, up to the available budget, will be allocated for travel and subsistence support to NFFA-Europe users according to the following criteria:

#### USER LIMIT PER PROPOSAL

NEP reimburses up to two users per proposal. This allows more research groups to benefit from the financial support provided.

#### TRAVEL AND SUBSISTENCE DURATION

##### Standard T&S Duration

Normally, the duration of trip cum stay includes two or more travelling days (the onward and the return journeys) and a number of days equivalent to the number of access days granted. One unit of access is the equivalent of a shift of eight hours that corresponds to a day.



### Consistency with UoAs

The overall duration of each access session must be consistent with the number of UoAs assigned. For example, a user granted 5 UoAs, which correspond to 5 days of access, cannot be supported for a stay that exceeds this period significantly, such as a two-week stay.

### Prolonged T&S Duration

Users may need to add one or two days before and after the scheduled access session for sample preparation, instrumentation setup, data analysis, restoration of the instrumentation setups, sample retrieval. Standard reimbursement terms apply.

### Extended T&S Duration

Users may need to add extra days for additional activities. Reimbursement for these extra days may be granted on a case-by-case basis, provided that the activities are complementary to the scientific topic of the NFFA-Europe access proposal. The extra days must be justified with a note in the reimbursement claim.

## **STANDARD REIMBURSEMENT TERMS FOR TRAVEL EXPENSES**

### Maximum Contribution

The maximum contribution per person per site accessed is €500. This means that regardless of the actual travel costs incurred, the maximum reimbursement will not exceed €500 per user per site. Otherwise, it will be equal to the amount of costs incurred, if lower.

### Evidence Required

Users must provide evidence of travel expenses. Acceptable documentation includes: between the outward and return journeys.

- Ticket invoices/receipts: Proof of purchase for travel tickets.
- Boarding cards: Evidence that the trip was completed.
- Travel Dates: Documentation must specifically cover expenses incurred on the days of the onward and return journeys for each access site visited.

### Local Transportation

No refunds will be provided for local transportation expenses incurred on the days

## **STANDARD REIMBURSEMENT TERMS FOR SUBSISTENCE COSTS**

### Maximum Contribution

The maximum contribution per person per day is €100. This covers daily expenses such as accommodation and meals during the trip and the stay at the access site.

### Evidence Required

Users must provide evidence of original subsistence expenses. Acceptable documentation includes:

- Meal tickets: Receipts for meals purchased.
- Invoices/receipts: Proof of payment for accommodation.



- Hotel bills: Detailed bills from hotels showing the duration of the stay and costs incurred.
- Travel Days: Documentation must cover expenses incurred on the two travel days (onward and return journeys) and for each day of stay per access site visited.

#### **Alternative Requests**

Users may be granted lump sum or per diem refunds only on condition it is a widespread practice in force at the access provider's site and is agreed beforehand. This system provides flexibility in how subsistence costs are claimed.

#### **No Compensation Between Days**

There is no compensation allowed between days when the daily subsistence ceiling has been exceeded and days when subsistence costs are lower.

### **MULTI-SITE ACCESS**

A proposal may require access to multiple sites. Each refundable user can benefit from the standard reimbursement terms and conditions for T&S costs per geographical site accessed.

### **MULTI-LEG ACCESS TO A SINGLE SITE**

#### **Overall Maximum Contribution**

For proposals requiring multi-leg access sessions to a single access site, the overall maximum contribution for travel expenses cannot exceed €500 in total.

#### **Subsistence Contribution**

The contribution for subsistence remains €100 per person per day for each access session, based on the total number of Units of Access (UoAs) assigned. Travel days are included.

### **MULTI-PROVIDER ACCESS TO A SINGLE SITE**

Proposals may require multi-provider access at one single site. This occurs at sites with a high concentration of providers such as Paris, Barcelona, and Trieste.

#### **Travel Contribution**

Ad hoc agreements must be arranged between the access providers regarding how to split the reimbursement of the travel expenses, as well as who will retain the necessary original supporting documentation.

#### **Subsistence Contribution**

The contribution for subsistence remains €100 per person per day for each access session, based on the total number of Units of Access (UoAs) assigned. It is recommended that hotel bills be split according to the periods spent under each provider's access period. Travel days are included in this contribution.



## TRAINING REIMBURSEMENT

Upon request, one NFFA-Europe user per each granted proposal may benefit from Special Training Sections to be carried out in the assigned provider's laboratory before the scheduled access starting date. The duration of Special Training Visits should typically not exceed 2 weeks and should take place within 6 months of their approval.

NFFA-Europe will cover Travel and Subsistence of the trainee as a simple extension of the scheduled transnational access. The service will be provided if the allocated budget is available. For more information, please consult <https://nffa.eu/nep-special-training>.

## FURTHER INFORMATION

### Welcome Packs

Once access is granted, more detailed guidelines specific to the assigned NFFA-Europe site will be provided. The user group leader of the awarded proposal will be contacted by the local coordination of access activities for further instructions. This ensures that users receive tailored guidance relevant to their specific access site, facilitating a smooth reimbursement process.

### Contact Information

For further information, users are encouraged to write to [uonet@nffa.eu](mailto:uonet@nffa.eu). This contact point provides answers to any additional questions or concerns, ensuring users have the necessary information and assistance throughout the reimbursement process.

## DETAILED TRAVEL & SUBSISTENCE EXPENSES

### TRAVEL COSTS

Timely planning and purchasing of travel tickets are essential to secure the best rates. Users should book their travel as soon as they are notified of their access period.

Round-trip tickets per user can be supported up to a ceiling limit of **500€**. In the case of a multi-site assignment, each of the two users can receive support for each geographical site accessed with a maximum contribution of **500€** per accessed site.

The total max contribution for proposals envisaging periodic access to the same site(s), i.e., multiple trips to the same site(s), will not exceed **500€** per person and site. The contribution can never exceed the actual travel cost-effectively incurred, i.e., if the cost of travel is lower than **500€**, the user will be refunded for the expense paid.



### **Air Travel**

Only economy class airfares will be reimbursed, and users are encouraged to opt for low-cost airlines whenever possible. Users must submit all relevant documentation, including original tickets, e-tickets, invoices, and boarding passes. These documents should clearly indicate the date of the journey, cost, and class of travel. All documentation must be submitted to the access provider within 60 days after the access period concludes to qualify for reimbursement.

### **Rail Travel**

When traveling by train, users should choose the shortest and most cost-effective routes. The same documentation requirements apply as for air travel.

### **Other Travel Costs**

Local transportation, such as airport shuttles, buses, taxis, and car rentals, are eligible for reimbursement, but only for the days of travel to and from the research site. No reimbursement is provided for local transportation during the days of the stay. Documentation must be provided, showing the date, cost, and nature of the travel.

## **ACCOMMODATION AND MEALS**

A maximum daily allowance of €100 per person is available to cover the costs of meals and accommodation.

### **Accommodation**

Users should seek affordable lodging options, such as campus accommodations or nearby budget hotels. Accommodation costs will be reimbursed for the duration of the access session, including weekends if the user is required to stay. However, meal costs for weekends will only be reimbursed if the user is actively working on those days.

### **Meals**

Users are encouraged to use on-campus facilities such as cafeterias or canteens when available, or to seek priced local restaurants. All meal expenses must be supported by receipts that clearly show the date, nature, and cost of the meal. In some cases, beneficiaries may offer per diem or lump sum reimbursements. If this option is available, users must submit a written request along with their claim.

## **MULTI-PURPOSE ONLINE TRAVEL AND SUBSISTENCE CLAIM FORM**

NFFA-Europe is currently developing an online form to streamline the process of submitting travel and subsistence claims. This tool will allow users to enter their expenses directly into the system, upload the necessary documentation, and track the status of their claims.

Work in progress.



## BEST PRACTICES

### **BEST PRACTICE**

#### **TIMING YOUR ARRIVAL AND DEPARTURE**

**Do:** Arrive and depart as close as possible to the scheduled start and end dates of your access session. Arriving one day before and departing one day after the session are acceptable and will be reimbursed.

**Do not:** Extend your stay beyond the access session unless it is necessary for activities related to your NFFA-Europe research. In such cases, justify the extension in your reimbursement claim; otherwise, additional subsistence costs will not be covered.

#### **Booking Flexible Travel During COVID-19**

**Do:** Purchase travel tickets that allow changes to dates and fares. If possible, choose tickets that include a force majeure clause to cover unexpected changes due to COVID-19 or other emergencies.

**Do not:** Assume that the grant's force majeure protections apply to individual users. Plan accordingly to avoid financial losses from unforeseen disruptions.

#### **Preserving Documentation**

**Do:** Preserve all your receipts and tickets, especially those printed on thermal paper, which can fade quickly. Take photos or scan them as PDFs immediately to ensure legibility.

**Do not:** Lose track of digital documents like QR codes. Ensure you save readable versions of all electronic tickets and boarding passes.

### **DOS AND DON'TS FOR CLAIMING REIMBURSEMENTS**

#### **Anticipate Expenses**

**Do:** Be prepared to cover all expenses, such as travel, meals, and accommodation, out of your own pocket initially.

**Do not:** Expect the administration to make bookings or prepayments on your behalf. Before departing, ask your access provider if their administration handles these arrangements.

#### **Reporting Pre-Payments**

**Do:** If your home institution pre-pays for travel, declare these expenses on your claim form. Ensure that the amounts are clearly reported.

**Do not:** Expect reimbursement from NFFA for pre-payments made by your institution. These must be settled through your home organization.

#### **Managing Exceeding Costs**

**Do:** If your expenses exceed NFFA-Europe's reimbursement ceilings (€500 for travel, €100 per day for subsistence), either accept a partial refund or seek a full refund from your institution.

**Do not:** Try to offset higher expenses on one day with lower expenses on another; the reimbursement is strictly per day.



### Handling Receipts and Bills

**Do:** Pay only for your expenses. Ensure that your receipts reflect only your costs, as bills reflecting other users' costs will not be reimbursed.

**Do not:** Advance payments for other users nor offer them drinks/meals. Stick to the guidelines for the number of receipts allowed.

### ADDITIONAL TIPS

#### Documentation Integrity

**Do:** Always submit original receipts and provide proof of payment, such as bank statements, credit card slips, or stamped receipts.

**Do not:** Claim meal costs from vending machines, as these are ineligible. Supermarket receipts are acceptable only if they reflect purchases for daily meals.

#### Currency Conversion

**Do:** Be aware that NFFA will convert foreign currency costs into Euros using the European Central Bank's exchange rate on your arrival date or the rate shown on your payment slip.

**Do not:** Forget to attach your payment slip if it shows the exchange rate used, as this can impact the amount reimbursed.

By following these best practices, to-dos, and tips, you can ensure a smooth and successful process for claiming travel and subsistence costs under the NFFA-Europe Pilot program.

## START DATE AND TRANSITIONAL PROVISIONS

These guidelines take effect as soon as they are published on the NFFA-Europe Pilot website. All users are required to comply with the rules outlined in this document, as well as any additional regulations specific to the site where their research will be conducted. These additional regulations will be communicated by the local site coordinators once access is granted.

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For any further questions or assistance, users are encouraged to contact the NFFA-Europe administration using the contact details provided above. The team is available to help ensure that all aspects of travel and subsistence claims are handled smoothly and in accordance with the project's guidelines.