

TRAVEL AND REIMBURSEMENT POLICY FOR CERIC-ERIC USERS

Article 1 – SCOPE

The support programme for Open access users has the scope to enable the mobility of researchers that may otherwise be prevented to travel to CERIC-ERIC Partner Facilities due to lack of resources. As such, it is not intended to cover all the costs associated to research but travel and accommodation. The main target of the program are users affiliated to institutions located in low performing Member State of the European Union or associated countries. However, in case of availability of funding, the support can be extended to the rest of the users' community.

This policy establishes the terms and conditions of the user support programme of the Central European Research Infrastructure Consortium (hereinafter CERIC-ERIC or Consortium).

Considering its legal nature, the Consortium must assure a wise use of its resources. Therefore, travel expenses must be reasonable and necessary. Users must always use the most cost-effective means of travel and exercise good judgment.

This policy is intended to be comprehensive, however in case of a situation not considered here, please contact useroffice@ceric-eric.eu.

Article 2 – ELIGIBILITY

The conditions for eligibility are the following:

- The proposal is submitted in reply to a call for open access and the peer evaluation by CERIC-ERIC Proposal review panel is positive (score above the threshold for scheduling);
- The support is requested at the moment of the submission of the proposal.
- The user supported has not violated the present policy in the past.

Users' responsibilities

Users are expected to:

1. Exercise good judgment with respect to expenses;
2. Report all expenses promptly and accurately with the required documentation. In cases when supporting documents (receipts, invoices, payment certifications...) are issued on a language different than Italian or English, an explanation of the content should be provided in the Travel reimbursement form, written in English;
3. Always use the most cost-effective means of travel;
4. Provide accurate actual expense details on the appropriate form for reimbursement;
5. Verify that all expenses submitted for reimbursement by the Consortium are valid and conform to this policy;
6. The individual seeking reimbursement is fully accountable and responsible for the request.

Article 3 – SUPPORT

The support covers travel and accommodation expenses for two users, for the period of measurement in a CERIC-ERIC facility as scheduled in the official calendar. It is allowed to request the extension of the support for arriving in place one day prior to the beginning of the measurements, as well as for leaving

one day after the end of the measurement, in case the travel arrangements require so (e.g. no transportation available after the closure of the measurements). Users may request, on their own budget, to add days to their stay. Transportation of goods such as equipment, instruments, sample holders, samples, etc. will not be supported.

3.a) Travel organisation

The user should submit, at least three weeks in advance, an access request for **CERIC FUNDED USERS** expressing any preference for the travel arrangements. These will be taken into account as long as they do not contradict the present policy. Requests received with an anticipation inferior to 21 days may be rejected. After approval of the access request by the CERIC user office, CERIC travel office will proceed with the bookings.

Once the booking will be finalised, any cost generated by a change in the travel (date, duration...) will be burdened by the user.

In case of cancellation requested by the user for reasons independent from the Consortium, the costs will have to be reimbursed to CERIC-ERIC. Failing to do so will exclude any future possibility for support.

3.b) Categories of expenses:

3.b.1) Transportation

Will be booked by the travel office, unless otherwise agreed. The following means of transportation are authorized:

- a) higher classes are authorized only if more economic due to special offers;
- b) Airplane – Economy class; for distances higher than 350 km
- c) Personal vehicle*, for at least two users traveling together
- d) Other means of transport (ship, urban and suburban buses, trams, metro, etc.)

*The Consortium will award a mileage rate for the authorized use of private vehicle. Current rate is 0.16€/km. Fuel and other expenses directly connected to the private vehicle (insurance etc.) will not be paid.

The following means of transportation shall be specifically approved by the travel office in order to be considered reimbursable:

a) Taxi;

b) Rented vehicles – mid-sized car is allowed. In case of use rented vehicle, the traveller has the right for reimbursement of fuel expenses, parking and highway tolls and second driver, as long as the cost is incurred strictly to work purposes. Car rental can only be allowed for at least two users traveling together. In any case the user has to give a deposit by credit card to the car rental to cover unauthorized extra charges. The following extra charges will not be covered:

- I. Extra insurances for reduction or elimination of costs through damage/theft;
- II. Road traffic fine or any other motoring penalty;
- III. Charges for missing fuel after returning the car;
- IV. Charges for one way rentals;
- V. Access kilometres apart from the direct way;
- VI. Prolongation of rental outside the supported time;
- VII. Any other charges.

Use of taxi and rented vehicles is justified if meeting one or more of these criteria:

- Absence of ordinary means of transport;
- Cost=effectiveness compared to the use of ordinary means of transport. The person concerned must demonstrate such cost=effectiveness, by comparing the total amount of the expenditure that would be incurred (travel expenses, possibly meals and / or lodging) in case of using ordinary means of transport;
- Overall efficiency of the option chosen also in relation to timelines and / or to less / more speed and related work commitments;

3.b.2) Meals

The support provided does not cover the cost of meals.

3.b.3) Accommodation

Whenever possible and convenient the reservations should be made by the Consortium due to the availability of better conditions.

3.b.4) Other Highway tolls, fuel (only for a rented vehicle), can be reimbursed, as long as they were incurred wisely and for the only purpose of the measurements.

Article 4 – DOCUMENTATION OF EXPENSES AND REIMBURSEMENT

Travel expenses are reimbursable when the location of departure coincides with the place of employment, as declared in the VUO. In any other cases, travel expenses will be refunded if the travel solutions are cheaper than the ones mentioned above and the difference in the place of departure or arrival can be fully justified. It will be up to the traveller to provide the necessary evidence. For every expense claimed for reimbursement, there should be, attached to the reimbursement form **original** supporting documents such as itemized receipts, invoices or other valid fiscal document. The receipt must identify the name of establishment, date, actual amount incurred, description, and receipt of payment.

All the documents should be suitable for tax purposes and may include the invoice or the receipt in accordance with local regulations in force in the respective countries. For taxi fares, in the absence of a cash receipt, the documentation should contain the date, the identification of the taxi, the amount paid and the signature of the driver.

Claims without receipts must be detailed explained indicating the circumstances for which the expense is not documented. This kind of expense can result in additional tax implications for the individual.

All the fiscal documentation written in a language other than English or Italian, must be accompanied by a courtesy translation, declaring the type of goods acquired and decoding the essential elements of the charges.

Reimbursement procedure

- 1) After finishing the experiment and completing the CERIC user survey, the user has to fill in a reimbursement form, available at the link: <http://www.ceric-eric.eu/uploads/Users/Refund%20form.doc>
- 2) The signed form together with the **original receipts** has to be sent to the CERIC travel office:

CERIC-ERIC

Attn. Travel Office

Strada Statale 14 = km 163,5 in AREA Science Park

34149 Basovizza, Trieste ITALY

Article 5 – EXPENSE INCURRED IN FOREIGN CURRENCY

For the reimbursement of expenses incurred in foreign currency the official exchange rate of the day of the expenditure will be applied. The exchange rate adopted is the one from the Bank of Italy.

Article 6 – DEADLINE FOR SUBMITTING THE REIMBURSEMENT REQUEST, PROCESSING THE REQUEST AND PAYING THE ELIGIBLE EXPENSES

The user should submit the request for reimbursement of incurred costs within 60 days from the end of the trip. Exceptions must be reasonably justified. The reimbursement request will be processed within maximum 60 days after the submission and will be paid by bank transfer, to the account declared in the access request.