Short Term Scientific Mission (STSM)

User guide

April/2017
1. PROCESS FLOW

This document describes the STSM process, from the moment an applicant submits an application for approval by the STSM coordinator to the payment and recording of the amount paid by the Grant Holder (GH) to the STSM grantee. It is necessary to separate the process in 2 parts: one describes the step to be performed before the mission starts and another the steps to be performed after the mission ends.

Regular STSM\textsuperscript{1} – process flow

\textbf{Short Term Scientific Missions (STSM) – process flow}

- **Before the STSM starts**
  - Applicant:
    - 1. Submits application
    - 2. Application pre-approved?
    - Grant Holder (GH):
      - 3. Needs variable?
      - 4. Sends Grant Letter
  - STM coordinator:
    - 1. Sends Grant Letter

- **After the STSM finished within 30 days**
  - Applicant:
    - 5. Sends report and hosts approval
  - Grant Holder (GH):
    - 6. Report approved?
    - 7. Final verification of amount and dates?
    - 8. Pay Grant

\textbf{STSM with a pre-payment request – process flow}

\textbf{Short Term Scientific Missions (STSM) – process flow}

- **Before the STSM starts**
  - Applicant:
    - 1. Submits application with pre-payment
    - 2. Application pre-approved?
    - STM coordinator:
      - 3. Activate the STSM
      - 4. Sends Grant Letter with pre-payment
  - Grant Holder (GH):
    - 5. Request pre-payment is valid?
    - 6. Request receipt and hosts pre-payment

- **After the STSM finished within 30 days**
  - Applicant:
    - 7. May Grant?
    - 8. Request reimbursement
  - STM coordinator:
    - 9. Request reimbursement
  - Grant Holder (GH):
    - 10. Final verification of amount and dates?
    - 11. Pay Grant

\textsuperscript{1} A regular STSM is an STSM that lasts between 5 and 90 days and the Grant amount is up to 2500 EUR paid in one instalment after the approval of the scientific report.
2. KEY PLAYERS

- Administrative Officer (AO)
- STSM applicant
- STSM coordinator
- Grant Holder (GH)

Administrative Officer (AO)

The administrative Officer (AO) assigns the role of STSM coordinator of the Action (ideally at MC1) to either one of the MC members/substitutes or to a WG member who was elected by the MC. If no person is elected as STSM coordinator, the MC Chair will fulfill this role.

STSM applicant

The STSM applicant can be, in a large sense, any person with an e-COST profile. An STSM applicant must specifically contribute to the research coordination and capacity building objectives of the COST Action for which they are submitting a STSM application.

The STSM applicant must be engaged in an official research programme as a PhD Student or postdoctoral fellow or can be employed by, or affiliated to, an institution, organisation or legal entity which has within its remit a clear association with performing research.

Specific provisions have been made to encourage the application submission by researchers from ITC countries. \(^2\) STSM applicants with an affiliation in an institution in an ITC country can request a pre-payment of 50% of grant. This is payable under 2 conditions: that the GH has sufficient funds to cover 50% of the grant in advance and that the host confirms to the GH that the mission has started.

STSM coordinator

The STSM coordinator is the person elected by the MC, ideally during MC 1, to coordinate the STSM awarding process. The STSM coordinator can perform the evaluation of applications alone or by heading an STSM panel. The STSM coordinator’s tasks include: evaluate applications, approve or reject these applications in e-cost, evaluate the scientific report after the mission, post-approve or reject the report.

Grant Holder

The GH monitors the incoming approved applications, sends the successful applicants their Grant Notification, makes the timely pre-payment of 50% of the grant (when applicable), and ensures that all grants are paid within the deadline of 30 days.

3. PROCESS OVERVIEW

3.1 Applicant creates an STSM request

The applicant encodes an STSM application by logging into e-COST and clicking on the STSM application tab. If the applicant’s e-COST profile is incomplete, they will first have to fill in the missing information (affiliation, education details, CV).

\(^2\) The following countries are considered ITC: Bosnia-Herzegovina, Bulgaria, Cyprus, Czech Republic, Estonia, Croatia, Hungary, Lithuania, Latvia, Luxembourg, Malta, Montenegro, Poland, Portugal, Romania, Slovenia, Slovakia, the former Yugoslav Republic of Macedonia, Republic of Serbia and Turkey.
Any already submitted applications are available for consultation in the applicant's e-COST profile. To submit a new application, the applicant presses the button 'Create a new STSM Request'.

The application page contains the following sections:

- Applicant details
- STSM details (the application must start and end during the same Grant Period (GP). If a GP is not active, the applicant will not be able to submit an application.
- Bank details
- Host details (must be located in a different country than the country of the applicant)
- Financial support
- Supporting documents (2nd page of the application also reachable by clicking on button in the upper left corner)

**STSM Application**
STSM DETAILS

Action Number: * -- Choose An Action --

STSM Title: *

Select Grant Period: -- Select Grant Period --

Start Date: *

End Date: *

Duration: 

The minimum duration for an STSM is 5 days, maximum duration is 180 days (if you are ECI), or 60 days (if you are not ECI).

Early Career Investigator (ECI) – A researcher within a time span of up to 8 years from the date they obtained the PhD/doctorate (full-time equivalent).

Motivation and Workplan summary:

1. Aim a motivation - Please explain the scientific and/or other motivation for the STSM and what scientific and/or other outcomes you aim to accomplish with the STSM.
2. Proposed contribution to the scientific objectives of the Action.
3. Techniques - Please detail what techniques or equipment you may learn to use, if applicable.
4. Planning - Please detail the steps you will take to achieve your proposed aim.

(directed to 200 words)

BANK DETAILS

Select bank account * -- Select Bank Account --

HOST DETAILS

Title: *

First Name: *

Last Name: *

Email: *

Institution: *

Institution Address Line 1: *

Institution Address Line 2: *

Institution Address Line 3: *

Institution City: *

Institution Country: * Please Select One
If the applicant is from an Inclusiveness Target Country, (s)he can apply for a pre-payment of 50% of the Grant. The applicant must keep in mind that the transfer of the 50% of the Grant can only take place after the mission has started and as such, requesting a pre-payment is more effective for STSMs longer than 1 month. The screen will show as below:

- Amount for Travel in € *
- Amount for Subsistence in € *(up to a maximum of EUR 180 per day)*
- Total Amount in €

**Disclaimer:** The pre-payment of 50% of your Grant is subject to the approval by the Grant Holder Institute. Should the request be approved, the first installment of the Grant will be processed upon receipt of the STSM host’s confirmation of your presence at the host Institute.

The request can be saved only if all fields have been completely on the page, otherwise the information is lost. After saving the request, the applicant must upload specific supporting documents in order to be able to submit the application.
As soon as the application is submitted, the STSM coordinator is notified. The applicant also receives a copy of the notification.
Dear STSM coordinator,

Dr. Elena Popovici has submitted an on-line STSM application request. Please verify the validity of this application and approve or reject it by clicking on the link below: http://mirror.prod.cost.local/stsm/apply/37583

We thank you for your cooperation.

Kind regards,

e-cost

Ref: ST-1.SM

If the STSM coordinator wishes to approve the application, the STSM coordinator must confirm that the Workplan is in line with the Action’s objectives, decide the level of the Grant that can be awarded, and confirm that the supporting documents are valid.

The amount of the awarded Grant can never be higher than what the applicant requested.

If the application is rejected, the STSM coordinator must provide a justification to guide the applicant in her/his resubmission.

3.3 The GH sends the applicant the Grant Notification Letter

As soon as the STSM coordinator approved the STSM application, the GH is notified to send the Grant Letter notification.
Dear Grant Holder,

COST Action: CA15204  
STSM reference number: 37289  
STSM applicant name: Dr Elena Popovici  
Home institution: Universitarea de Medicina, Iasi, RO  
Host institution: Vienna University, Vienna, AT  
STSM start and end date: 2017-05-01 - 2017-05-30

On behalf of the Management Committee of the COST CA15204, I would like to inform you that:

- The proposed STSM workplan is in line with the scientific objectives of the Action;
- **The awarded grant amounts to: 1500 EUR;**
- The supporting documents are eligible and complete.

Please verify that funds are available to support this application and send the applicant the Grant Notification Letter.

Kind regards,

Dr Janet Smith  
STSM coordinator

Ref: ST-2.SM

The GH logs into e-cost and activates the application.

**Actions / Periods / Manage Grant 6 / STSMs**

![STSM table]

**Please note:**
- You can add an STSM when you have received an e-mail from MC Chair or STSM Manager notifying that an application for an STSM has been approved.
- Using the "STSM Applications..." you can retrieve the approved STSM from the list of submitted applications.
- When reviewing the approved application you can activate the STSM using the appropriate button.

**Short-Term Scientific Missions – Applications**

The following list only shows STSM applications whose start and end date fall within the Grant Period from 2017-05-01 to 2017-10-14.

Choose an application in the list below and click the "Review"-icon to proceed.

<table>
<thead>
<tr>
<th>#</th>
<th>Applicant Name</th>
<th>Applicant E-mail</th>
<th>Amount</th>
<th>Submission Date</th>
<th>Start Date</th>
<th>End Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>ST583</td>
<td>Dr Elena Popovici</td>
<td><a href="mailto:elena.caruse@unfiast.ro">elena.caruse@unfiast.ro</a></td>
<td>1500</td>
<td>2017-04-28</td>
<td>2017-05-01</td>
<td>2017-05-31</td>
<td>31 days</td>
</tr>
</tbody>
</table>
Short-Term Scientific Mission Application

When the Management Committee has approved this application use this button.

Activate

Nutrition science
From: 2017/05/01
To: 2017/05/31
Duration: 31 days

The GH is able to modify the title, topic, dates, and institute name, should this be required.

The GH must confirm if the applicant is an Early Career Investigator in the cases when the duration of the STSM exceeds 90 days. If the STSM duration is up to 90 days, then the box remains unticked.

The GH must confirm that the applicant is coming from an Inclusiveness Target country and, in cases when there is a request for a pre-payment of 50% of the Grant, that the GH has sufficient funds available.

If the STSM Coordinator awarded a Grant lower than the amount requested by the applicant, the distribution of the Grant would be updated accordingly (the amounts for travel and subsistence would be reduced).
3.3.1 The GH makes the payment of 50% of the Grant

When the STSM applicant from an ITC requests and is granted a pre-payment of 50% of the grant, the STSM host receives an notification requesting her/him to confirm to the GH that the STSM started on schedule. Without the host confirmation, the pre-payment will not be done.

The actual transfer of 50% of the grant can take several days after the receipt of the STSM host email confirmation.
The GH can consult the approved application by using the different options available for each STSM, as shown below.

<table>
<thead>
<tr>
<th>ID</th>
<th>Participant</th>
<th>Start</th>
<th>End</th>
<th>Duration</th>
<th>Grant Amount in EUR</th>
<th>Report</th>
<th>Payment</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>37562</td>
<td>Dr. Elena Popovici</td>
<td>2017-03-01</td>
<td>2017-03-31</td>
<td>31 days</td>
<td>1500.00</td>
<td>-</td>
<td>750.00</td>
<td>750.00</td>
</tr>
</tbody>
</table>

### 3.4 STSM grantee uploads the scientific report and host approval of the report

1 day and 15 days after the end of the STSM, the grantee receives a reminder to upload the scientific report and the host approval of the report. The deadline to submit the last supporting documents is 30 days from the end of the STSM.

The submission of the supporting documents is mandatory or the Grant is cancelled. Late submission, beyond the deadline, can also lead to the cancellation of the Grant and, in cases when a pre-payment was done, the obligatory reimbursement by the grantee of the amount received.

A scientific report template is available on the Supporting documents page or on-line here: [http://www.cost.eu/STSM_report_template](http://www.cost.eu/STSM_report_template)

The STSM grantee must complete this template and save it in pdf before uploading it in e-COST.

The host approval of the report can be an email.
Dear STSM applicant,

This is a reminder that you are required to submit for approval your scientific report within 30 days from the end date of your STSM. You are kindly requested to complete the following steps:

- Ensure that your scientific report is approved by a senior scientist in the host institute.
- Click on the link below before 2017-05-20 and upload your approved scientific report and the host approval. [http://branch qa.cost.local/stsm/apply/37289](http://branch qa.cost.local/stsm/apply/37289)
- Add the bank details on which you wish to receive the Grant to your e-cost profile, if you have not done so already.

Failure to submit your scientific report on time may result in the cancellation of the STSM grant.

The payment of your Grant is carried out by the Grant Holder following the receipt of the STSM coordinator approval of your scientific report.

Kind regards,

e-COST

Ref: ST-6 SM

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### 3.5 STSM Coordinator approves/rejects the scientific report

The STSM coordinator is notified when the applicant submitted the scientific report and host approval and has to verify the validity of the report by clicking the link in the notification.

Dear STSM coordinator,

Dr Elena Popovic has submitted the scientific report related to the following STSM application:

**COST Action:** CA15204  
**Home institution:** University of Iasi, RO  
**Host institution:** Vienna University, AT  
**STSM start and end date:** 2017-05-10 - 2017-05-31

Please verify the validity of this scientific report and approve or reject it by clicking on the link below: [http://branch qa.cost.local/stsm/apply/37287](http://branch qa.cost.local/stsm/apply/37287)

We thank you for your cooperation.

Kind regards,

e-COST

Ref: ST-7 SM
If the application is rejected, the STSM coordinator must provide a justification to guide the STSM grantee in her/his resubmission.

If the STSM coordinator approves the report, the GH is notified that the grant can be paid.

Dear Grant Holder,

COST Action: CA15204  
Home institution: University of Iasi, RO  
Host institution: Vienna University, AT  
STSM start and end date: 2017-05-10 - 2017-05-31  

On behalf of the Management Committee of the COST, I would like to inform you that:

- This STSM has been completed in line with the proposed STSM Workplan  
- The scientific report is approved  
- The Grant can be paid.

Kind regards,

STSM Coordinator

Ref: ST-8.SM

3.6 The GH makes the payment of the Grant or, if applicable, of the 2\textsuperscript{nd} instalment of the Grant

The GH can download an excel list of STSM grants that are ready to be paid. This list contains the necessary information for the GH financial and accounting department to process the Grant transfer.
Once the GH financial and accounting department processed the Grant transfer, the GH can record the payment and complete the STSM process.

In the cases when 50% of the Grant was pre-paid, the GH must complete the amount for the 2nd instalment before recording.

By recording the payment, the status changes to Paid.

The process is complete.