

H2020 – Claiming Expenses**Key things to remember**

- ❖ ONLY costs, such as personnel, travel, consumables etc., included in the original budget will be eligible.
- ❖ ONLY cost directly associated with implementing the project will be eligible.
- ❖ KEEP all receipts and travel documents for up to 5 years after the project ends in case of an external audit.

Direct personnel costs and OTL

- Project Managers should have a clear record of who is or is expected to be involved in the project, their staff category and show clear link to the work to be completed.
- ALL personnel working on the project MUST use OTL to book all their time (i.e. 37hrs per week)¹.
- Only time recorded in OTL can be claimed.
- OTL bookings should not be done retrospectively.
- OTL bookings must be signed off every month - see separate timesheet guidance for details.
- Staff on H2020 projects CANNOT use automated OTL bookings.

Research Costs

- Follow internal procurement procedures.
- Keep all invoices, receipts and date of purchase.
- Keep track of purchases in relation to activities listed in the grant agreement for financial reporting.
- Internal facilities and access charges are only eligible if included in the original budget and are fully auditable.

Travel and Subsistence

- All Staff must follow the guidelines in the [Travel, Subsistence and Expenses Policy](#).
- All staff should submit a [Foreign Travel request form](#) when travelling outside the UK.
- Expense claim envelopes MUST be marked for EC project.
 - It is advisable to write the Acronym of the project on the front of the envelope.
- All claimants MUST provide itemised receipts.
 - GPC/credit card payment authorisation receipts are NOT sufficient
- No split bills or alcohol.
 - If you are unable to get a split bill, and it is a project related group meal, ensure all attendees are listed on the meal receipt.
- Tips are not an eligible cost.
 - Except in those instances where the invoice of the restaurant includes a certain mandatory amount as payment for the 'service'.
- Entertainment or hospitality expenses (including gifts, special meals and dinners) are not eligible.
- MUST keep copy of all travel documents and they MUST be submit with the related expenses claim form.
- Name badges, attendance record or other 'proof' that you actually attended the meeting/event should be submit with expenses claim form.
- Keep a record of the purpose of the journey and links to the projects' activities for reporting purposes.

¹ If you normally do not book your time via OTL please contact your department management accountant.