



EUROQOL

Reimbursement Portal Manual

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EUROQOL

Please follow the steps outlined below to obtain reimbursement of your invoice:

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Step 1: Sign up / Register



[Instruction video](#)

– **Sign-up / Register.**

– **Go to** <https://euroqol.org/research-at-euroqol/funding/reimbursementportal/> and select 'Access Reimbursement Portal'.


A – You can **create an account** via your existing Google account or alternatively select your preferred e-mail address to sign up with.

– **Confirm** the e-mail address through the link you receive by email* and follow the next steps.

* Please also check your **spam / junk folder** if you have not received the e-mail with the link.

A

Member Login

 LOG IN WITH GOOGLE

OR

Email Address

We'll never share your email with anyone else.

Password *

Remember me

LOG IN

[Not registered? Click here](#) [Reset password](#)

Step 2: Enter bank account details



[Instruction video](#)

– Before creating an invoice, your bank account details must be added to your profile.

– **Click on '+Enter Your Bank Details'.**

B – Please add the name of your bank, account holder, IBAN and SWIFT code.

❖ For non-IBAN bank accounts please add any ACH, Fedwire codes, BSB codes or other additional information in the field *Remarks on Bank Account*. In case of doubt, please check with your bank for the complete details.

C – Please include the currency you wish to be reimbursed in, and ensure that this currency can be processed by your bank.

Enter Your Bank Details

Please fill in the fields below.
Note: No details need to be provided for an intermediary bank, should you use one.
Please ask your bank for your IBAN and BIC/Swift codes or see here:
<https://www.iban.com/search-bic>

Account Holder	Number of bank account IBAN
<input type="text"/>	<input type="text"/>
Name of the bank	BIC or Swift Code
<input type="text"/>	<input type="text"/>
Full Address of the Bank	
<input type="text"/>	
Currency	Remarks on Bank Account ⓘ
<input type="text" value="Select currency"/>	<input type="text"/>

CANCEL **CREATE**

B

C

Step 3: Submit your first invoice



[Instruction video](#)

– After adding your **bank account** you can click on **invoicing** to create a new invoice.

– Click on + **create new invoice**.

D – After clicking + **create new invoice** you will see a pop-up asking you to specify if your invoice relates to:

- Reimbursement of ***travel and other expenses***.
- Reimbursement of ***hours*** (*exec, board, WGs, VMC etc.*).
- Reimbursement of ***EuroQol-funded projects***.

Select the relevant category.

New Invoice

Select invoice form category

- REIMBURSEMENT OF TRAVEL AND OTHER EXPENSES
- REIMBURSEMENT OF HOURS (EXEC, BOARD, WGs, VMC ETC.)
- REIMBURSEMENT OF EUROQOL-FUNDED PROJECTS

CANCEL

Step 3a: Reimbursement of travel and other expenses

E – At the top right, please **select your preferred bank account** that you wish to be used for the payment of your invoice.

F – Add **a brief description of the trip/expense item**.

G – If applicable, please add the **departure date and the return date of the trip**.

– Press **next** to continue.

The screenshot shows a web form titled "Reimbursement of Travel and Other expenses". At the top right, there is a "Select Bank Account" dropdown menu with a close button (X) and a label "Select your preferred Bank Account". Below this is a grey box containing "Instructions (1)":

- Select your preferred Bank Account.
- Complete one form per trip/ expense item.
- If relevant provide the departure and return dates.

The main form area has a label "Brief description of the trip/ expense item" above a text input field containing "EXAMPLE". Below this field is a button labeled "BACK TO INVOICE OVERVIEW". To the right, under the heading "If applicable:", there are two date input fields: "Departure" with the value "March 30, 2021" and "Return" with the value "March 31, 2021". At the bottom right is a large blue "NEXT" button.

Annotations: A yellow line labeled "E" points to the "Select Bank Account" dropdown. A yellow line labeled "F" points to the "EXAMPLE" text in the description field. A yellow line labeled "G" points to the "NEXT" button.

Step 3a: Reimbursement of travel and other expenses

H – Now **line items** can be added where you can provide a description of the costs, the currency, the amount and attach receipts, tickets, or other documents.

❖ Please try to make the description as specific as possible e.g. *Train ticket Airport-Amsterdam*.

– You can add additional line items by clicking the button **+ Add Line Item**. The line items can have different currencies; the built-in converter will automatically convert the total amount to the currency of your selected bank account.

I – Once all details of your reimbursement are added, you can click **submit** (bottom right).

Brief description of the trip/ expense item

EXAMPLE

Departure: February 21, 2021

Return: February 22, 2021

DESCRIPTION	CURRENCY	AMOUNT	AMOUNT CONVERTED TO EUR	ATTACHMENT
train ticket	JPY - Yen	500,0	= 3,92	Upload Browse ×

+ Add Line Item

Total amount converted to **EUR** ⓘ : **3.92**

H →

BACK TO INVOICE OVERVIEW

SUBMIT

Step 3b: Reimbursement of hours (Exec, Board, WGs, VMC etc.)

– The invoice process for **reimbursement of hours (Exec, Board, WGs, VMC etc.)** is largely the same as for Steps 3a and 3c. Start by selecting the **bank account** you wish to use for your reimbursement.

– You are asked to enter an **expense description, currency, amount** and to **add an attachment with your invoice** (*please use Word, PDF or Excel format*)

❖ When submitting your invoice, please add the WG activity, the number of hours and the summary of tasks undertaken within those hours?

– Click **submit** once all the required fields are completed.

❖ Note, if you have conducted work for more than one Working Group, please submit a separate invoice for each.

Reimbursement of hours (Exec, Board, WGs, VMC etc.)

Select Bank Account ×
Select your preferred Bank Account

Instructions

- Select your preferred Bank Account.
- Complete one form per working group/team.
- Provide a brief description, the currency, the amount and an invoice, as an Excel, JPG, PDF or Word file attachment.

Brief description of the expense item

EXAMPLE

CURRENCY	AMOUNT	AMOUNT CONVERTED TO	ATTACHMENT
Select currency <input type="text"/>	<input type="text"/>	=	Upload <input type="text"/> <input type="button" value="Browse"/>

Total amount converted to ⓘ :

Step 3c: Reimbursement of EuroQol-funded projects

J – To **request reimbursement of EuroQol-funded projects**: Start by selecting the **bank account** you wish to use for your reimbursement.

K – Add the **project title** (from the Approval Letter)

L – Enter the **EQ project number** (if applicable; this can be found on the Approval Letter)

Click **next** to continue.

The screenshot shows a web form titled "Request reimbursement of Euroqol funded projects". At the top right, there is a dropdown menu labeled "Select Bank Account" with the text "Select your preferred Bank Account" and a close button (X). Below this is a grey box containing "Instructions (1)" which reads "Please:" followed by a bulleted list: "Select your preferred Bank Account.", "Submit one form per EuroQol-funded project at a time.", "Enter the EQ project number (as mentioned in your approval letter).", and "Enter the project title." Below the instructions are two input fields: "Project Title" with a placeholder "Project Description" and "EQ Project Number" with a placeholder "Example '20180780'". At the bottom, there are two buttons: "BACK TO INVOICE OVERVIEW" and "NEXT". Three yellow callout letters are present: 'J' points to the "Select Bank Account" dropdown, 'K' points to the "Project Title" input field, and 'L' points to the "EQ Project Number" input field.

Step 3c: Reimbursement of EuroQol-funded projects

M – On this page you are asked to provide a **brief description**, an **invoice as an attachment** and (if applicable) **receipts**.

❖ Please upload your invoice as an attachment in PDF, Word or Excel format.

N – Once all the required fields are completed, **submit**.

New Invoice | Invoice No.

Instructions (2)
Please:

- Provide a description of the reimbursement you are seeking, the amount and the currency.
- Make sure you submit a formal invoice as attachment.
- If applicable, please add receipt(s) as attachment.

Project Title EQ Project Number

DESCRIPTION	CURRENCY	AMOUNT	AMOUNT CONVERTED TO EUR	ATTACHMENT
<input type="text" value="First invoice"/>	<input type="text" value="Select currency"/>	<input type="text"/>	=	<input type="text" value="Upload"/> <input type="button" value="Browse"/>

[+ Add Line Item](#) Total amount converted to **EUR** ⓘ :

[BACK TO INVOICE OVERVIEW](#)

M

N

Step 4: Access your invoice overview (checking payments, checking comments, update info)



[Instruction video](#)

O – You can search invoices in the searchbar (top right). You can search on invoice number, status or on the amount.

❖ After submitting an invoice you will receive an e-mail confirmation. This contains the invoice number.

P – In the invoice # column, please click on any invoice number to see specific queries regarding your invoice.

Q – Status indicates whether your invoice is **new**, **ready for payment**, **paid** or **if any additional information is requested**.

R – You can **edit** or **delete** your invoice. This can only be done if the invoice has not been paid or approved yet.

❖ Sometimes additional information is required. Please check the **comments** before making any changes.

The screenshot shows the 'Invoices Overview' page. At the top left is a '+ CREATE NEW INVOICE' button. At the top right is a search bar with the placeholder text 'Search Invoice Number | Status | Amount'. Below these is a table with the following columns: INVOICE #, DESCRIPTION, COMMENT, STATUS, INVOICED AMOUNT, DATE CREATED, and ACTION. The table contains four rows of invoice data. Callout 'P' points to the 'INVOICE #' column, 'Q' points to the 'STATUS' column, and 'R' points to the 'ACTION' column.

INVOICE #	DESCRIPTION	COMMENT	STATUS	INVOICED AMOUNT	DATE CREATED	ACTION
E-0448	VMC working gro...		New Invoice Invoice incomplete	EUR 0.0	February 23, 2021	EDIT DELETE
E-0443	EXAMPLE		New Invoice Submitted	EUR 3.92	February 22, 2021	EDIT DELETE
E-0294	Valuation WG gr...		Ready for Payment	EUR 1500.0	December 17, 2020	
E-0293	BHV COURSE	Hey hope thi... 2 months ago	Paid on € 0.0	EUR 13.45	December 17, 2020	DOWNLOAD PDF

Step 5: Notifications and support



[Instruction video](#)

– You will receive **e-mail notifications** once your invoice is **submitted**, has a **comment** or has been **paid**. Please access the Reimbursement Portal and your invoice overview to view **comments**, as additional information or action may be requested.

S – The little **notification bell** (top right) will show **a red icon** if a new notification is available. Click here it to **view it**.

T – See **comments** by clicking on **view**.

U – On the **Help Page** you can find support documents. Alternatively if you cannot find the answer to your question or require support, please reach out to finance@euroqol.org.

The screenshot shows a web browser at the URL `euroqol.herokuapp.com/invoices/home`. The dashboard is titled "DASHBOARD SUMMARY" and contains several cards:

- Invoices Paid:** € 5267.0 (with a "View" link)
- Total Amount Pending:** € 2,102.81 (with a "View" link)
- Total Invoice:** 16 (with a "View" link)
- Latest Comment:** About 2 Hours Ago (with a "View" link)
- Help Page:** (with a "View" link)

Annotations include:

- A yellow arrow labeled **S** pointing to the notification bell icon in the top right corner of the browser.
- A yellow arrow labeled **T** pointing to the "View" link under the "Latest Comment" card.
- A yellow arrow labeled **U** pointing to the "View" link under the "Help Page" card.

A notification banner at the top right reads: "You have a new comment in Invoice No. E-0468".

Frequently asked questions

Q: What is the address of the Reimbursement Portal?

A: <https://euroqol.org/research-at-euroqol/funding/reimbursementportal/> and select 'Access Reimbursement Portal'..

Q: Will my data be stored securely?

A: Yes, the Reimbursement Portal uses the latest encryption and authentication technology to ensure that no unauthorized access to your data will be obtained.

Q: I lost my password, what should I do?

A: Go to <https://euroqol.org/research-at-euroqol/funding/reimbursementportal/> , select 'Access Reimbursement Portal', and select Reset password. You will receive an email with a link to reset your password.

Q: I want to know the status of my reimbursements, where can I find this?

A: See Page 12: Step 5: Notifications and support.

Q: I can't find the answer to my question in this document. What should I do?

A: Please check the instruction video on the Help Page. If you still have questions, please contact finance@euroqol.org .