Reimbursement Portal Manual

Version	1.1
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Please follow the steps outlined below to obtain reimbursement of your invoice:

Step 1: Sign up / Register

Instruction video

– **Sign-up / Register**.

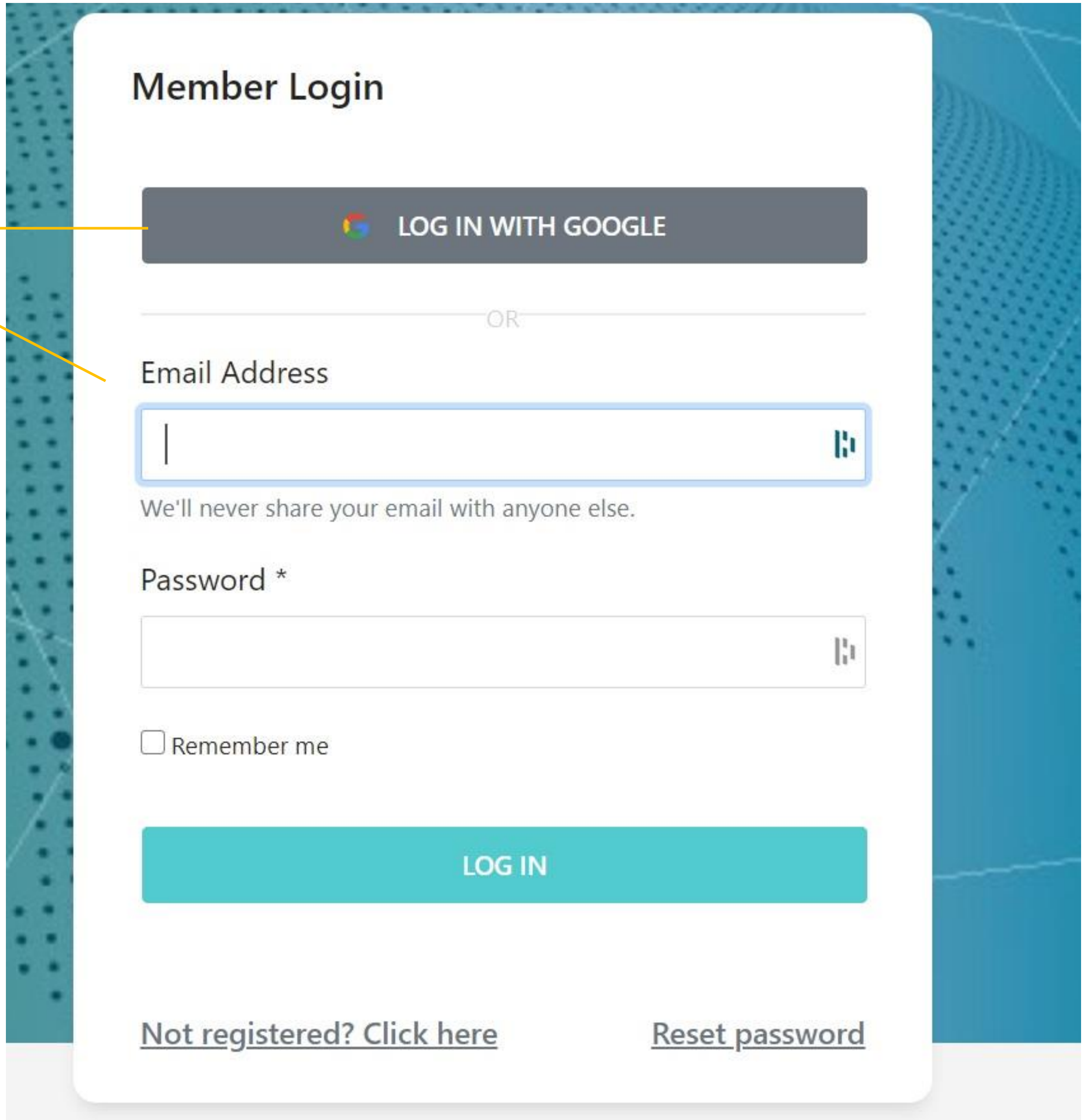
– **Go to** https://euroqol.org/research-at-euroqol/funding/reimbursementportal/ and select 'Access Reimbursement Portal'.

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



Step 2: Enter bank account details

Instruction video

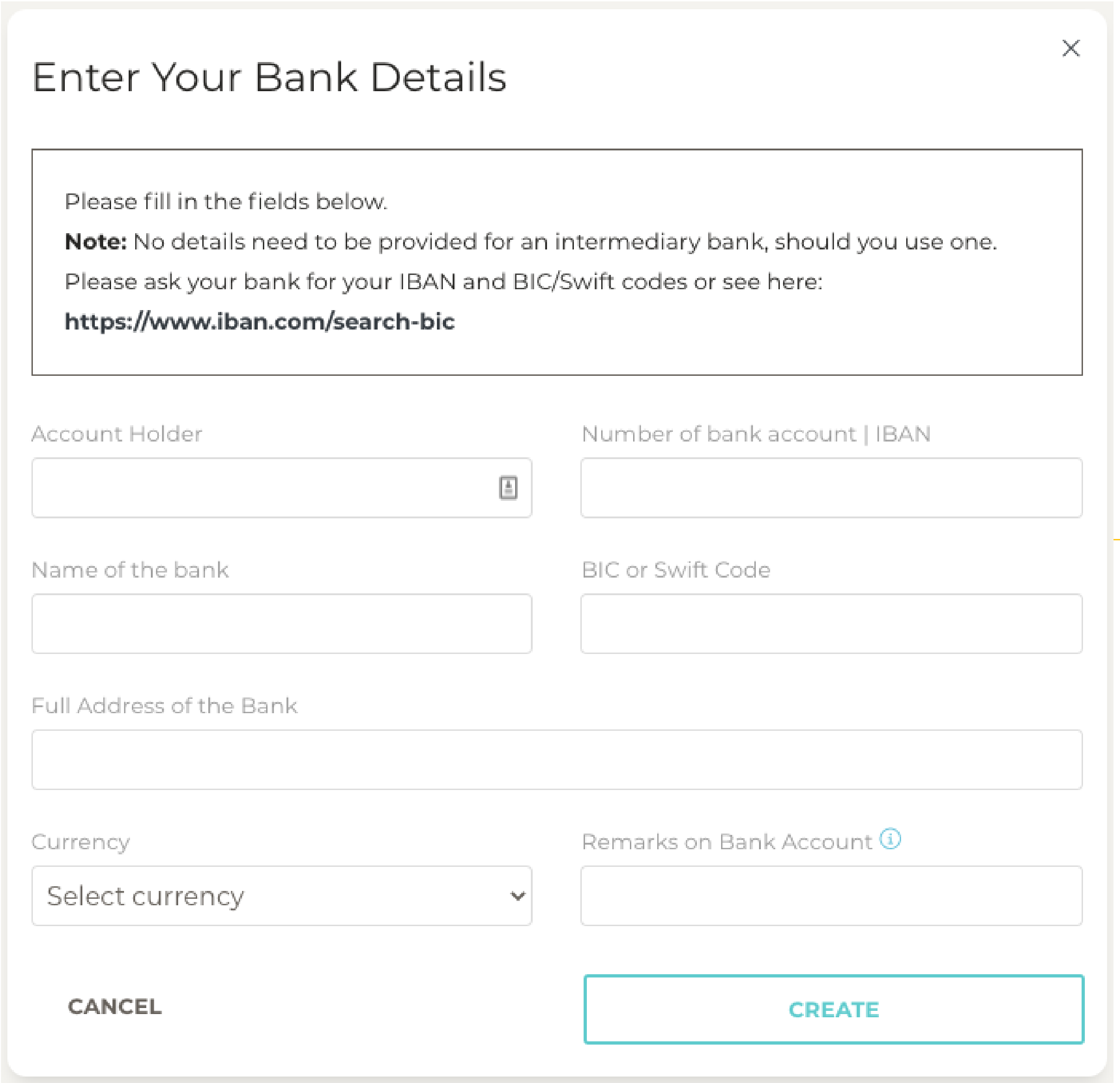
– Before creating an invoice, your bank account details must be added to your profile.

– **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.



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.

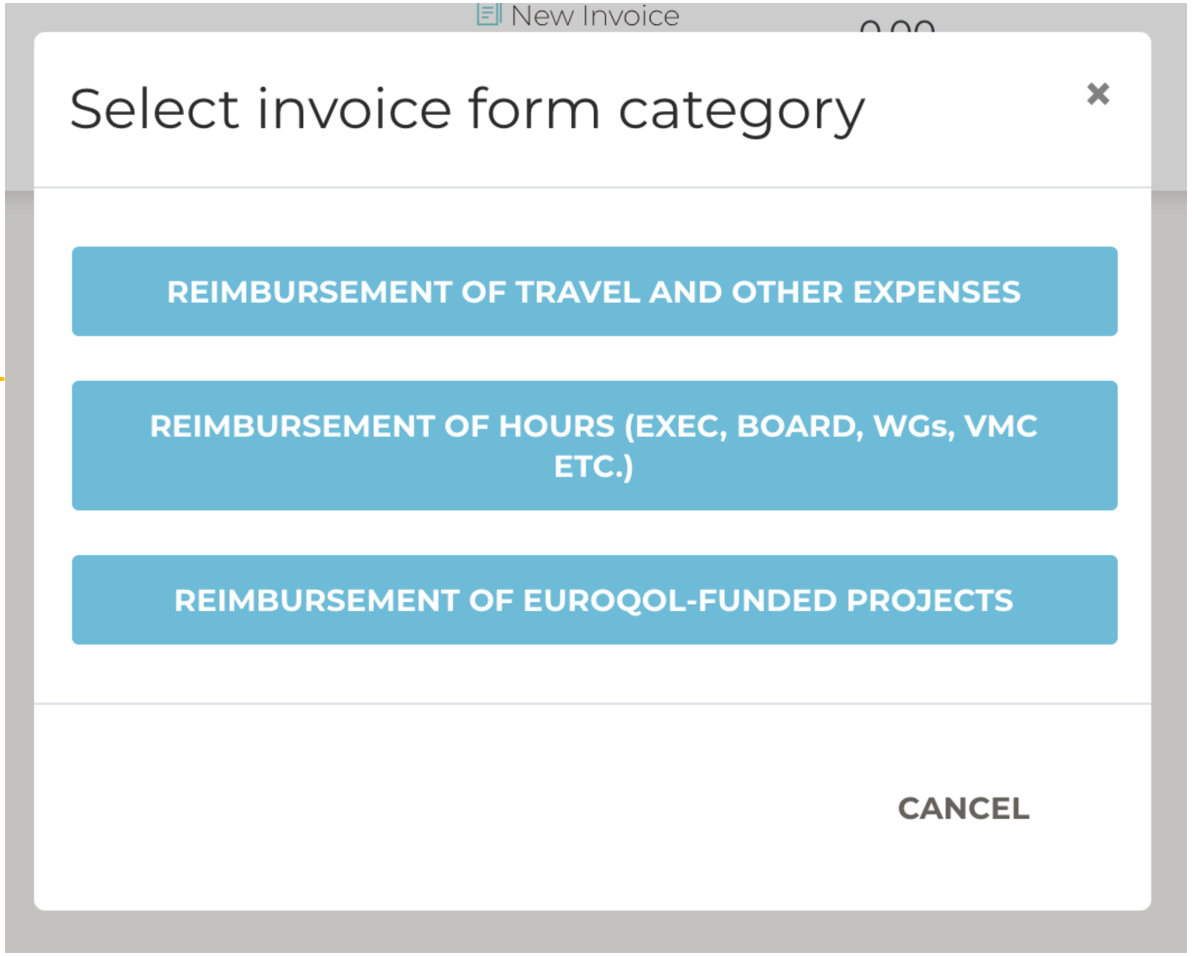
– Click on **+ create new invoice.**

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.

D



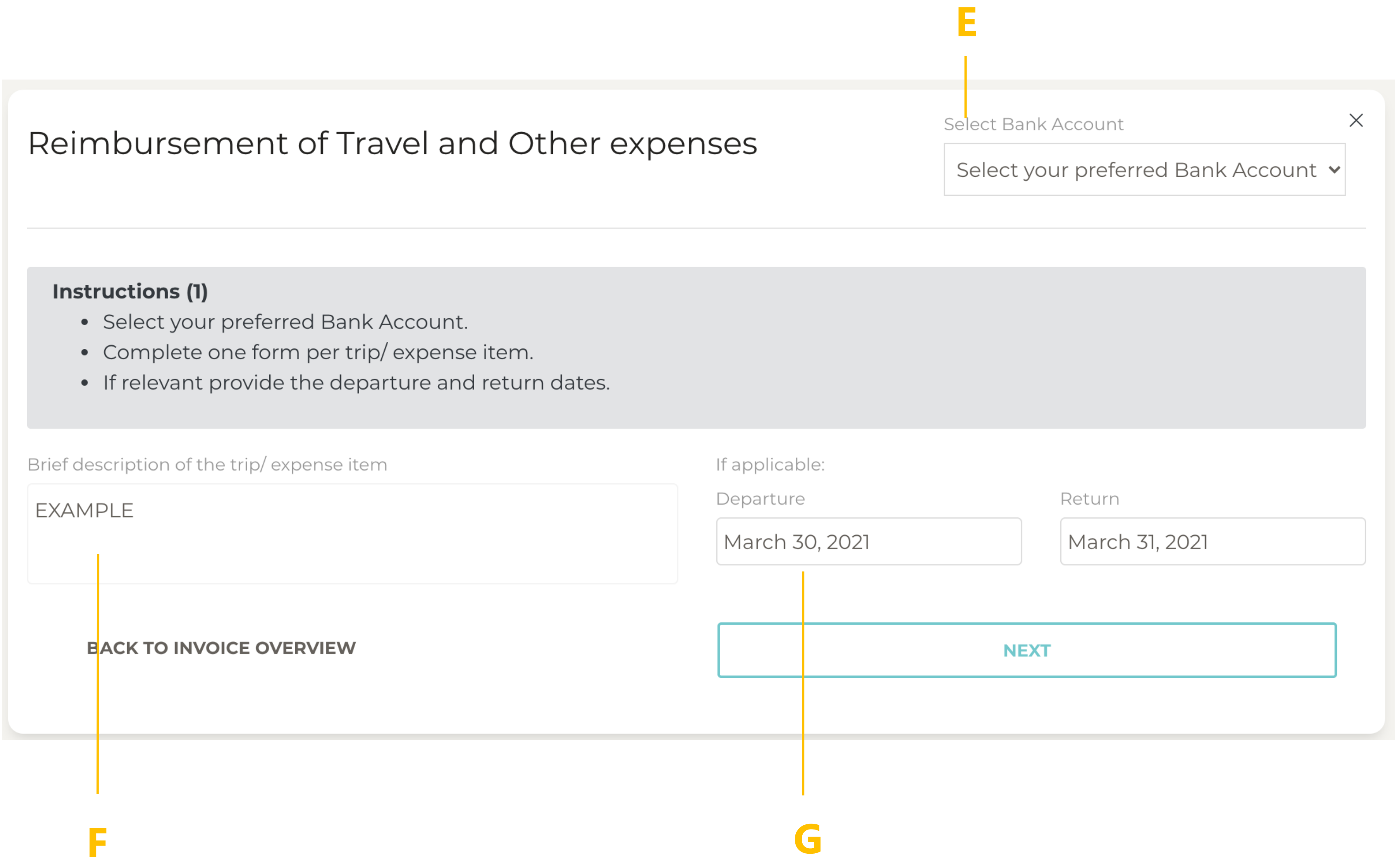
Step 3a: Reimbursement of travel and other expenses

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.



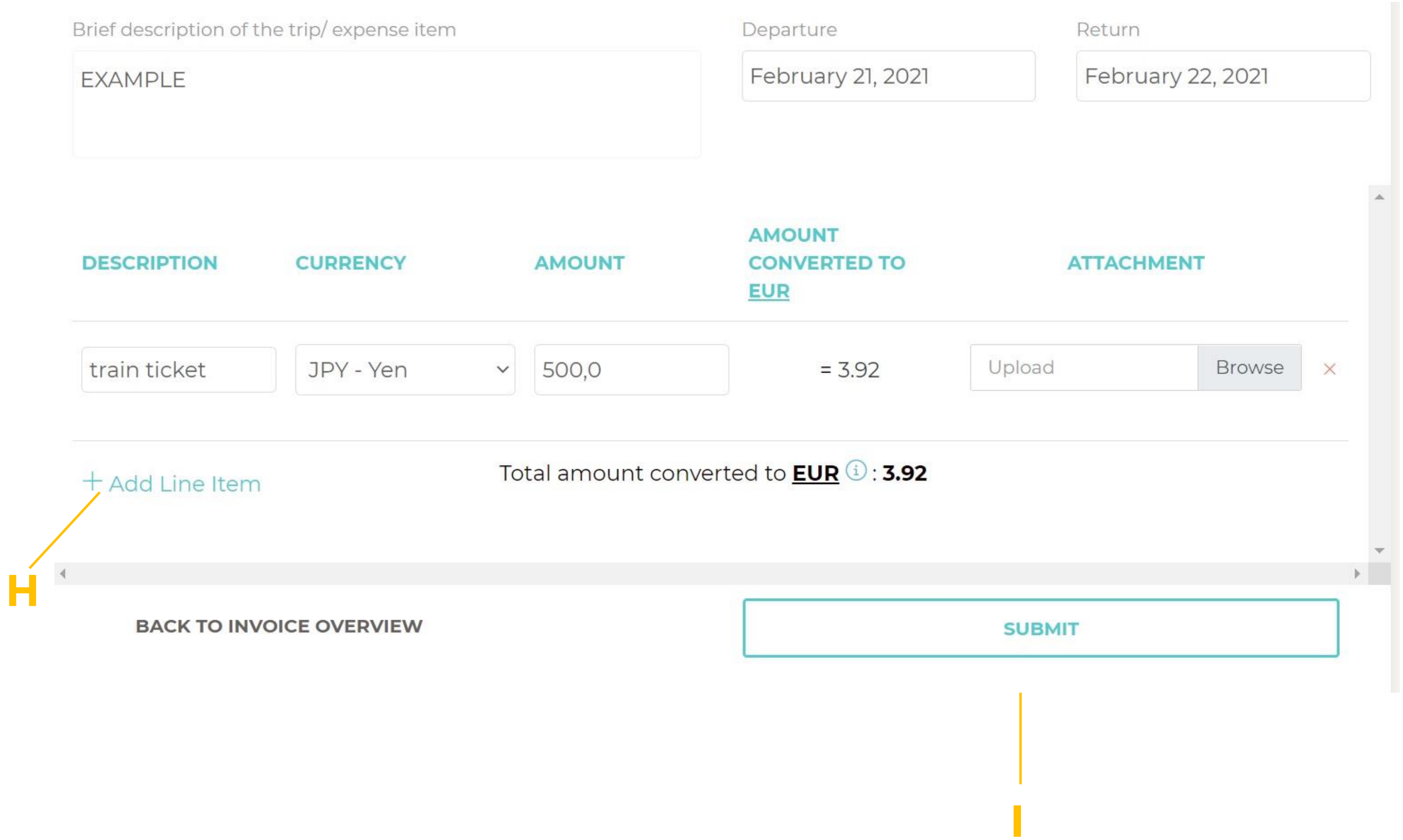
Step 3a: Reimbursement of travel and other expenses

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).



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

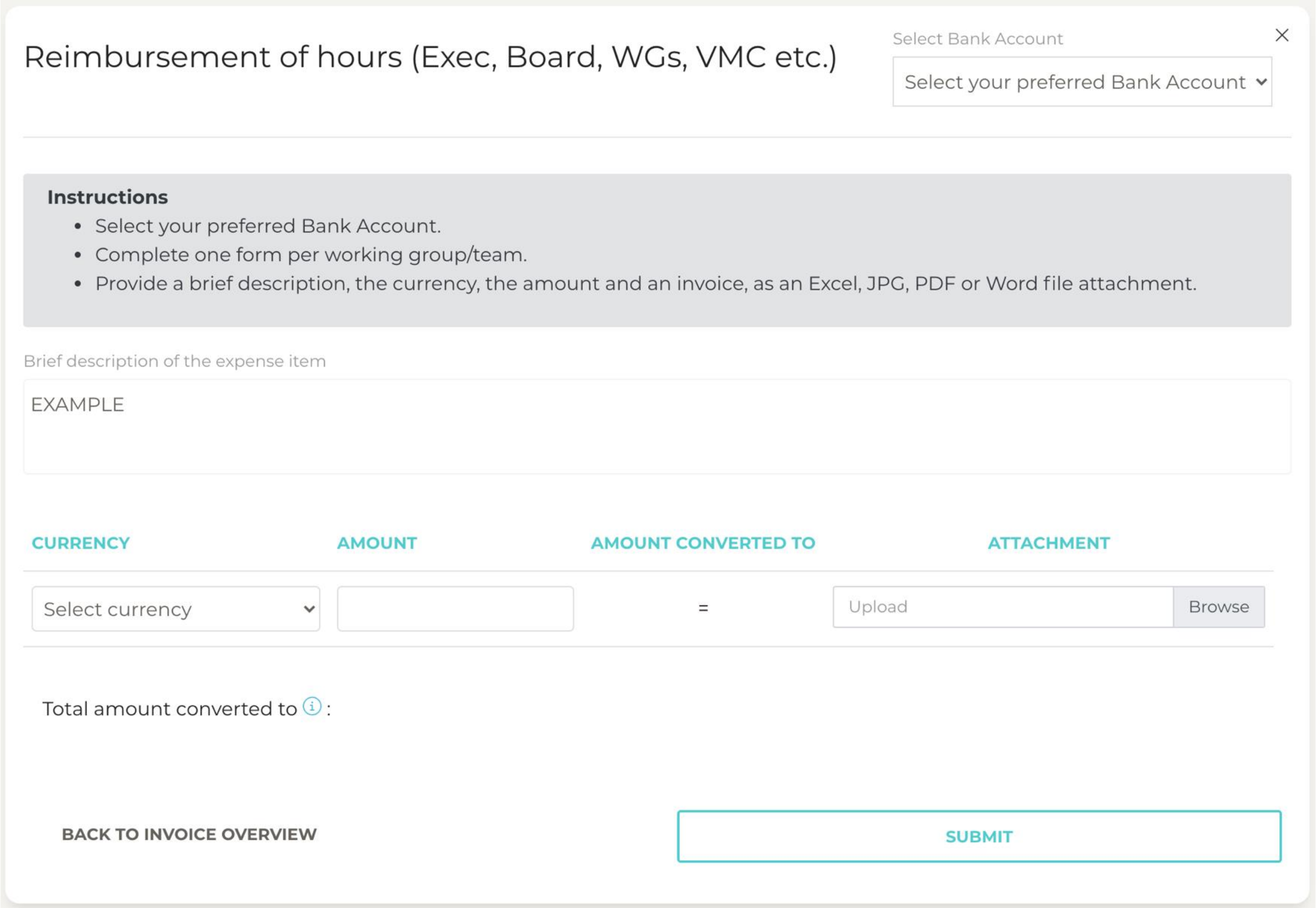
– The invoice process for **reimbursement of hours (Exec, Board, WGs, VMC etc.)** is largely the same as for Steps 3a and 3c. Start by selecting the **bank account** you wish to use for your reimbursement.

– 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.



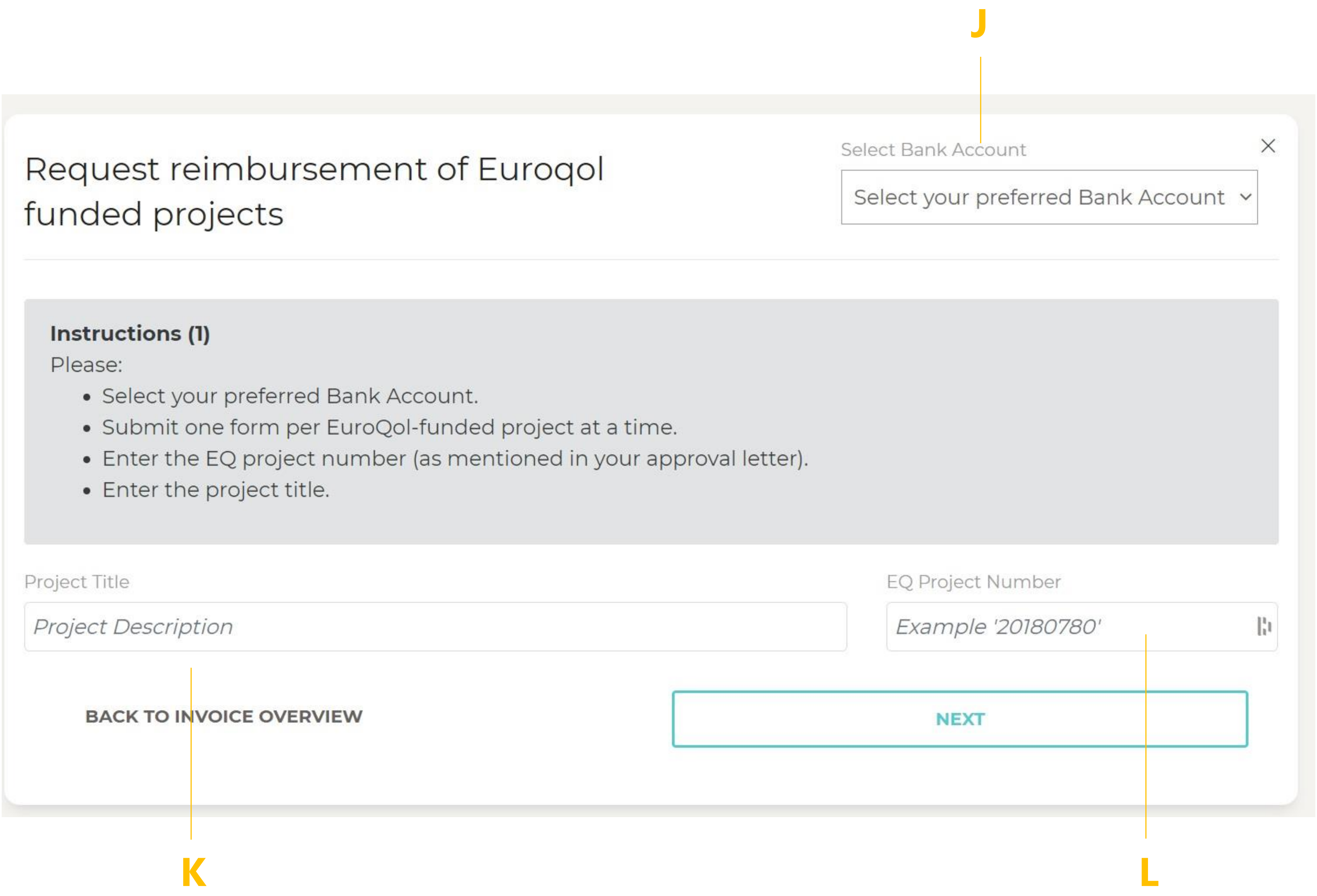
Step 3c: Reimbursement of EuroQol-funded projects

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.

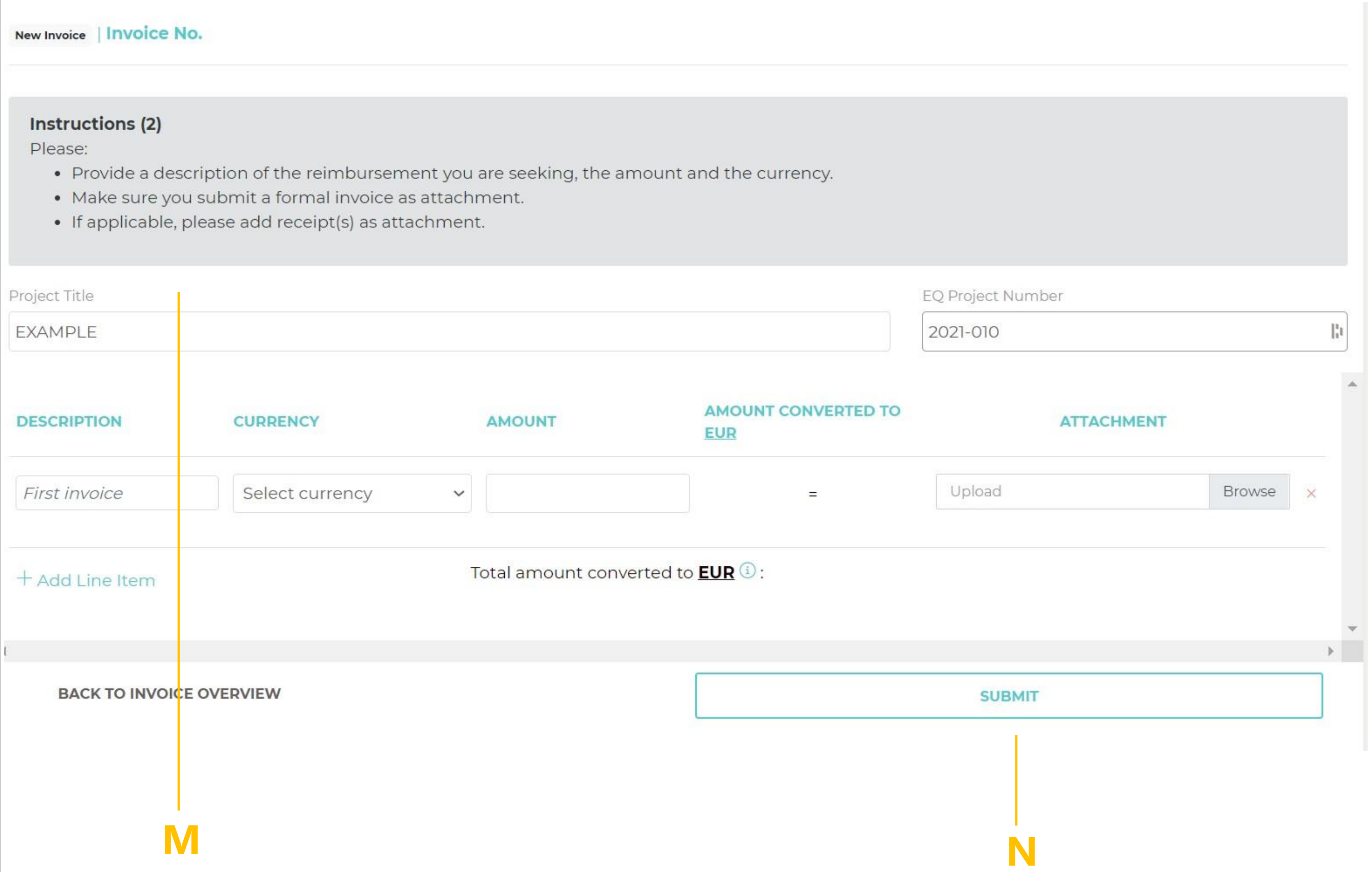


Step 3c: Reimbursement of EuroQol-funded projects

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**.



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.

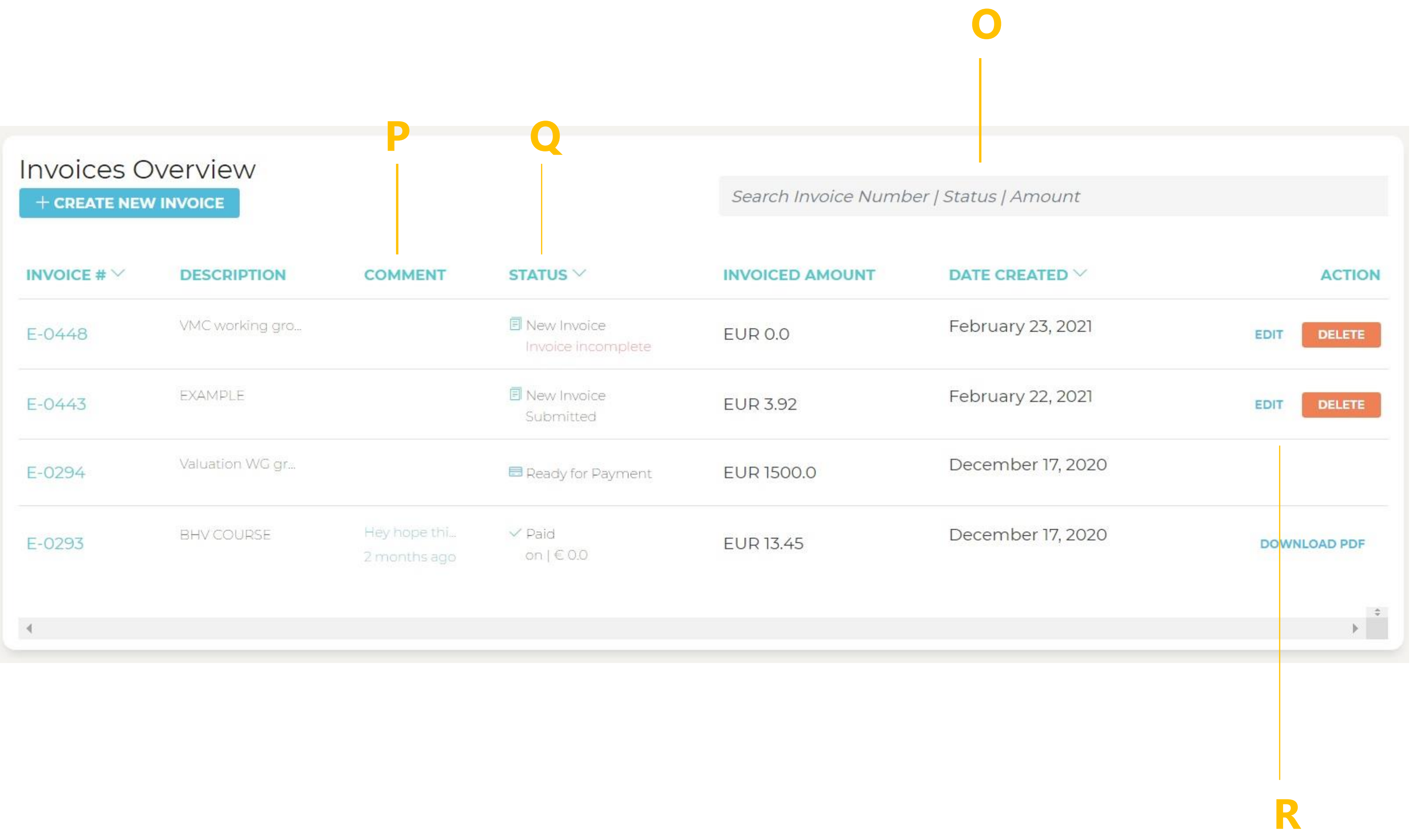
- After submitting an invoice you will receive an e-mail confirmation. This contains the invoice number.

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.



Step 5: Notifications and support

Instruction video

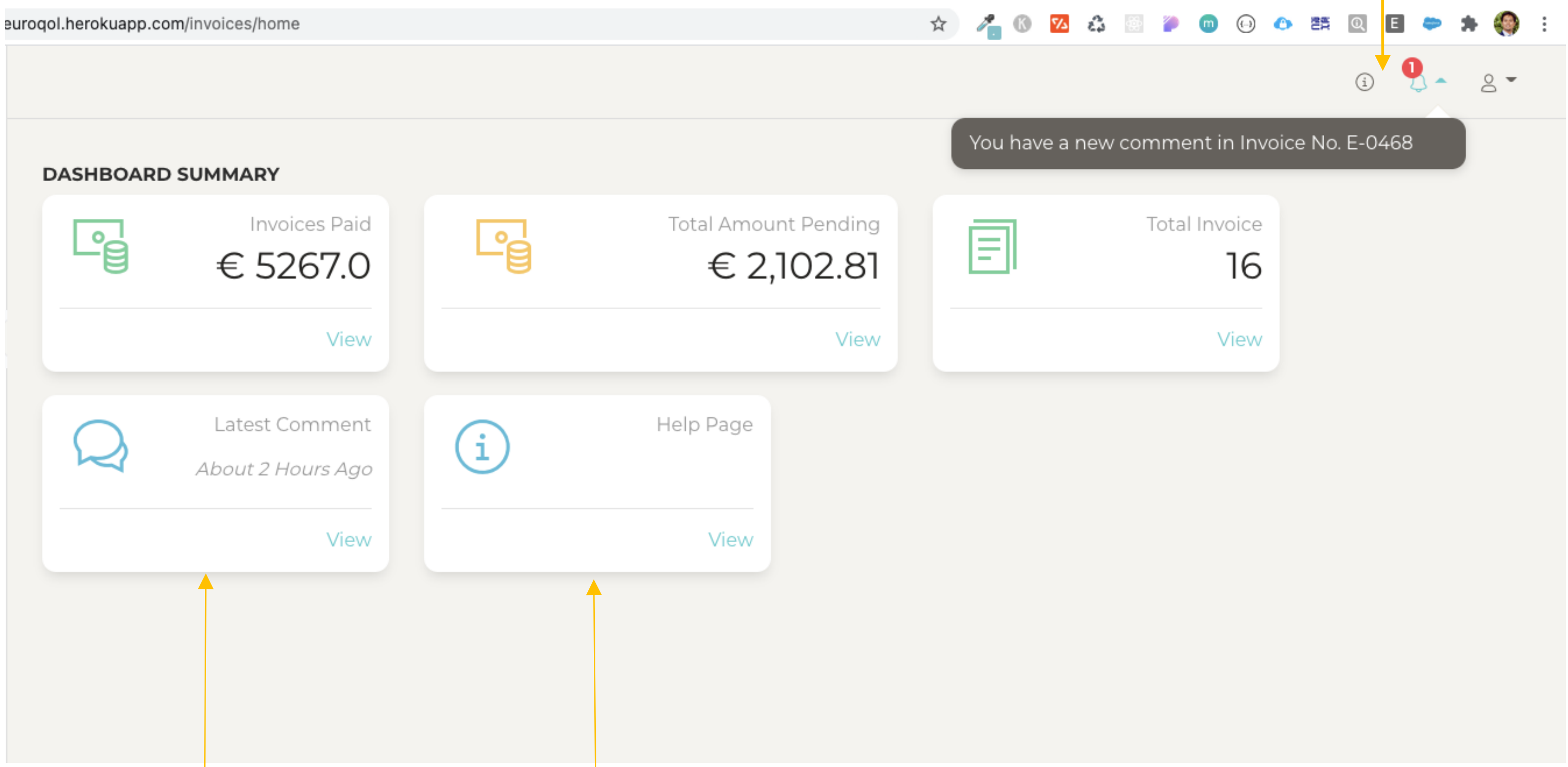
– You will receive **e-mail notifications** once your invoice is **submitted**, has a **comment** or has been **paid**. Please access the Reimbursement Portal and your invoice overview to view **comments**, as additional information or action may be requested.

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.

S



T U

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 Reimbursment 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 .